

AMS infoAdvantage

AMS infoAdvantage Business Objects Training

Presented by CGI-AMS

July 21, 2005

July 26, 2005



Agenda

- Introduction to AMS *info*Advantage
- Business Objects Concepts and Applications
- Lessons
 - Basic navigation
 - Demonstration
 - Question/Discussion
 - Exercises



infoAdvantage Reporting Capabilities

- Simple and complex queries
- Flexible report lay out (slice and dice, breaks, sort on fields)
- Detail and Summary information in one report
- Logos, cross tabs and charts in reports
- Use any field in the Data Warehouse to query or filter on

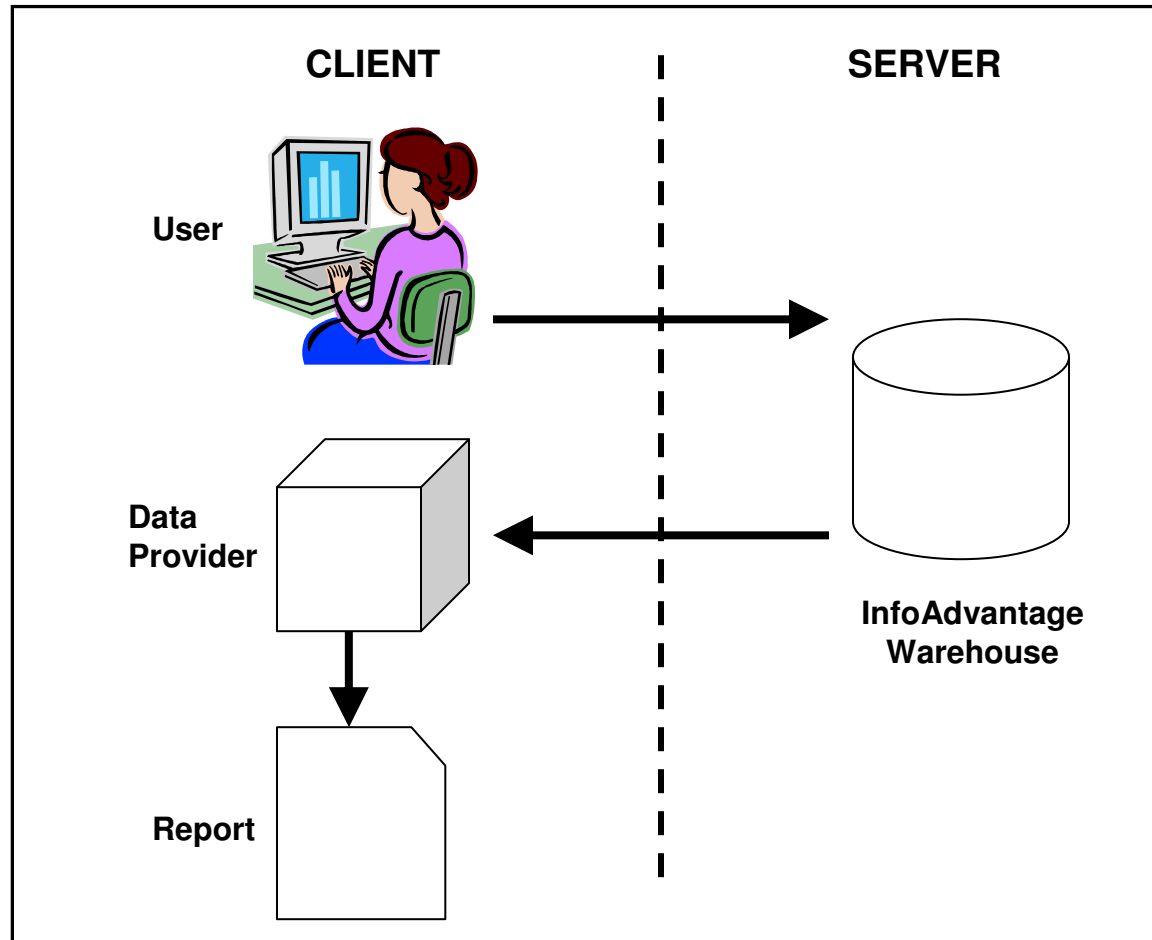


AMS infoAdvantage – Thick Client

- Needs client installation on desktop
- Allows user to work offline/not connected to database
 - Make changes and Save files locally
 - Load them up to repository when connected later
- Allows for more complex and flexible report layout
 - More complex table options (collapse data etc)
 - Hardcode SQL
 - Only recommended for testing purposes (by pass security set up)
- Retrieve, run thick client and thin client reports

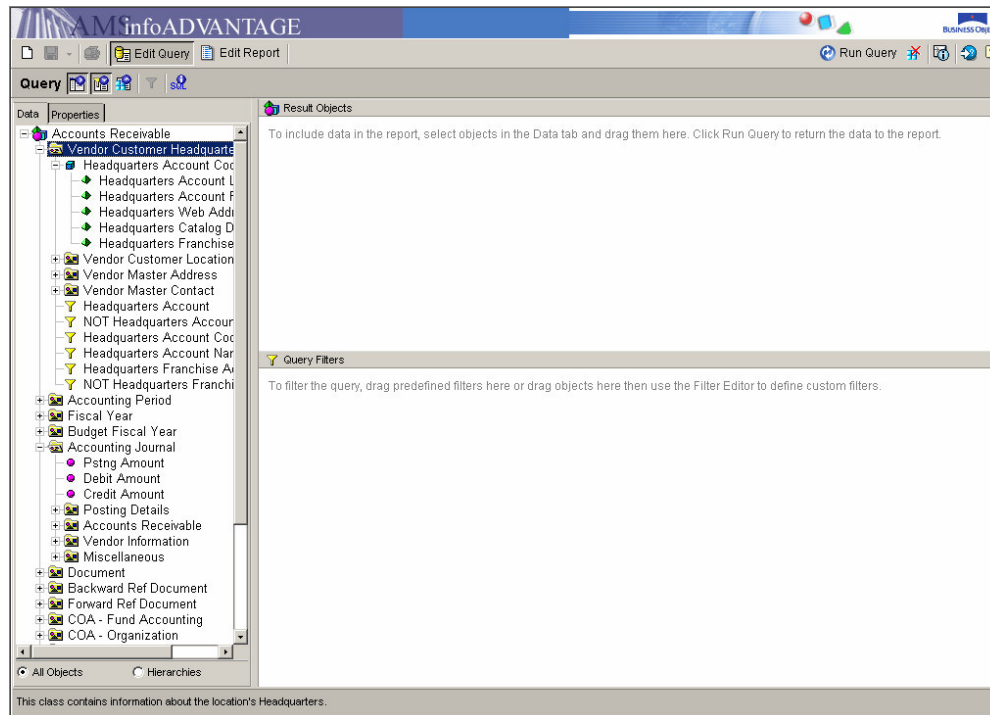


The Query Process



Universe, Class, Object

Universe shows db fields related to certain functional area.
Example: Accounts Receivable



Report Objects



▶ Class. Contains logical groups of related objects



▶ Dimension object. Default object type, typically key objects, and are objects that reports will be based on



▶ Detail object. Always associated with a dimension object



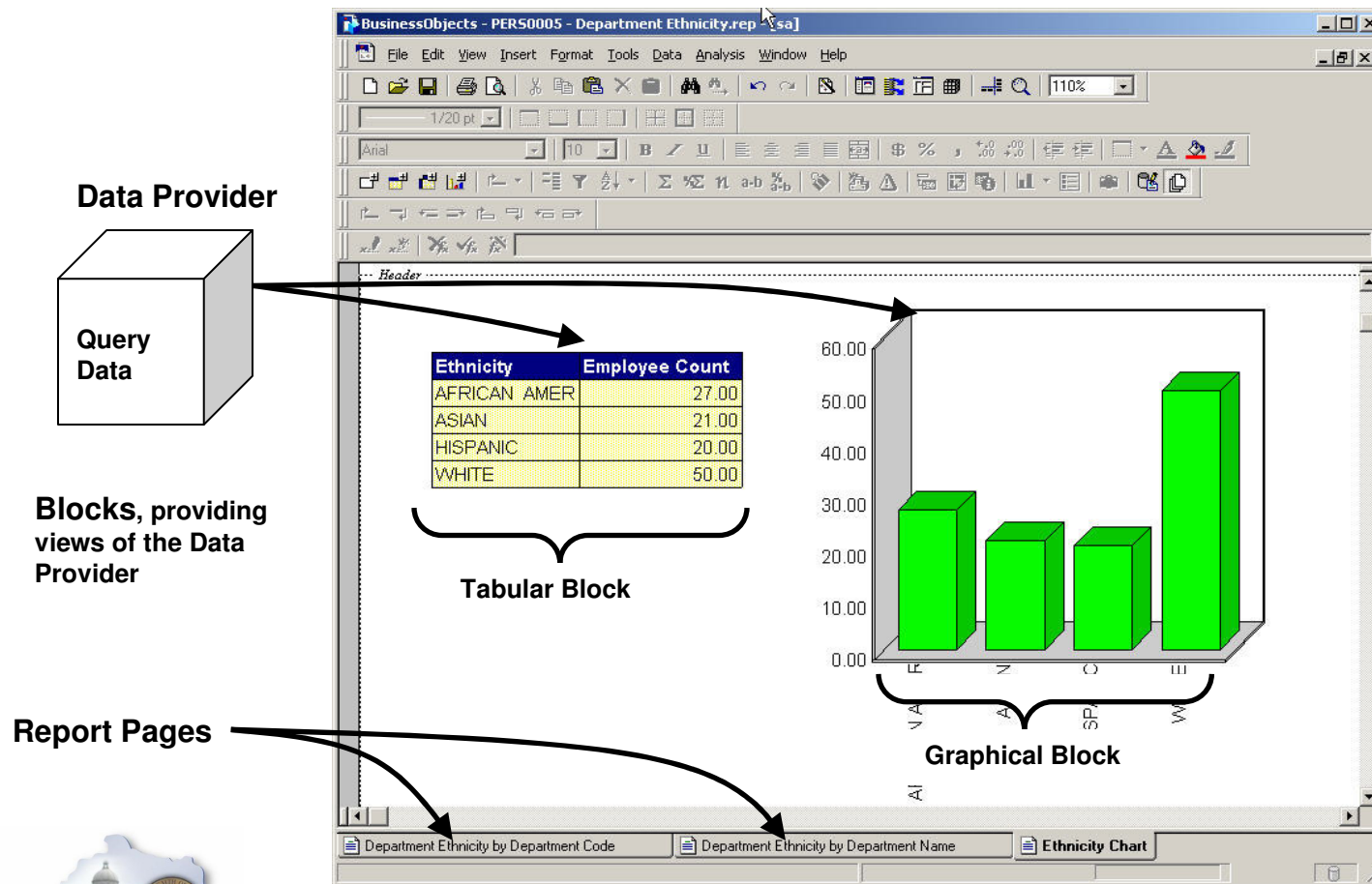
▶ Measure object. Numeric data (like amounts). Summarized by default



▶ Filters: special kind of object

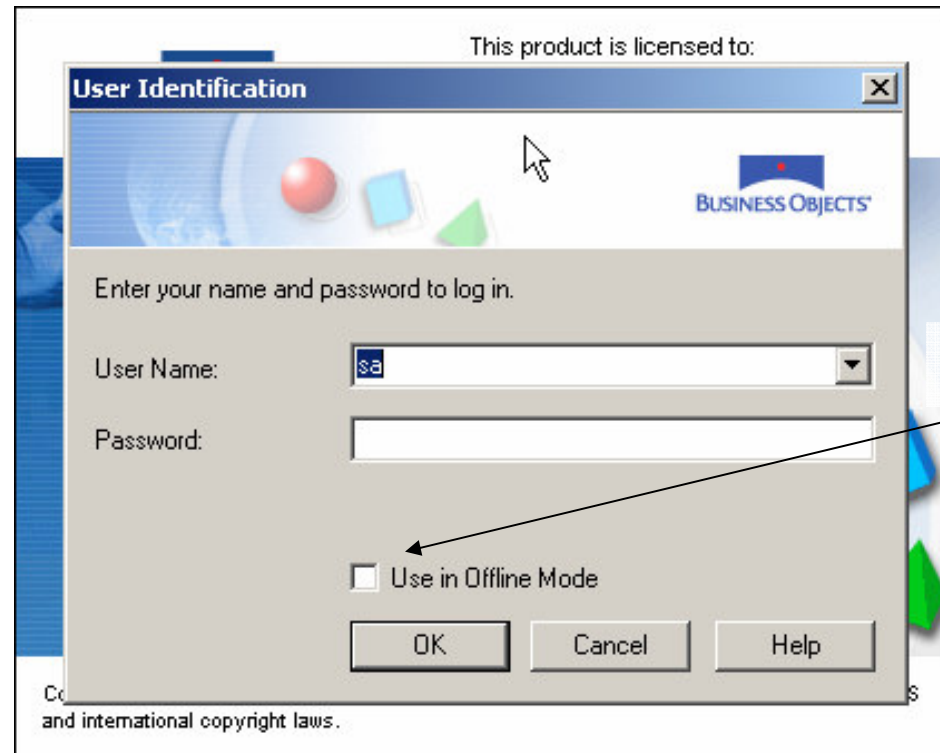
Documents

A Document is composed of three main parts:



Starting Business Objects

Start > Programs > Business Objects > Business Objects 6.1

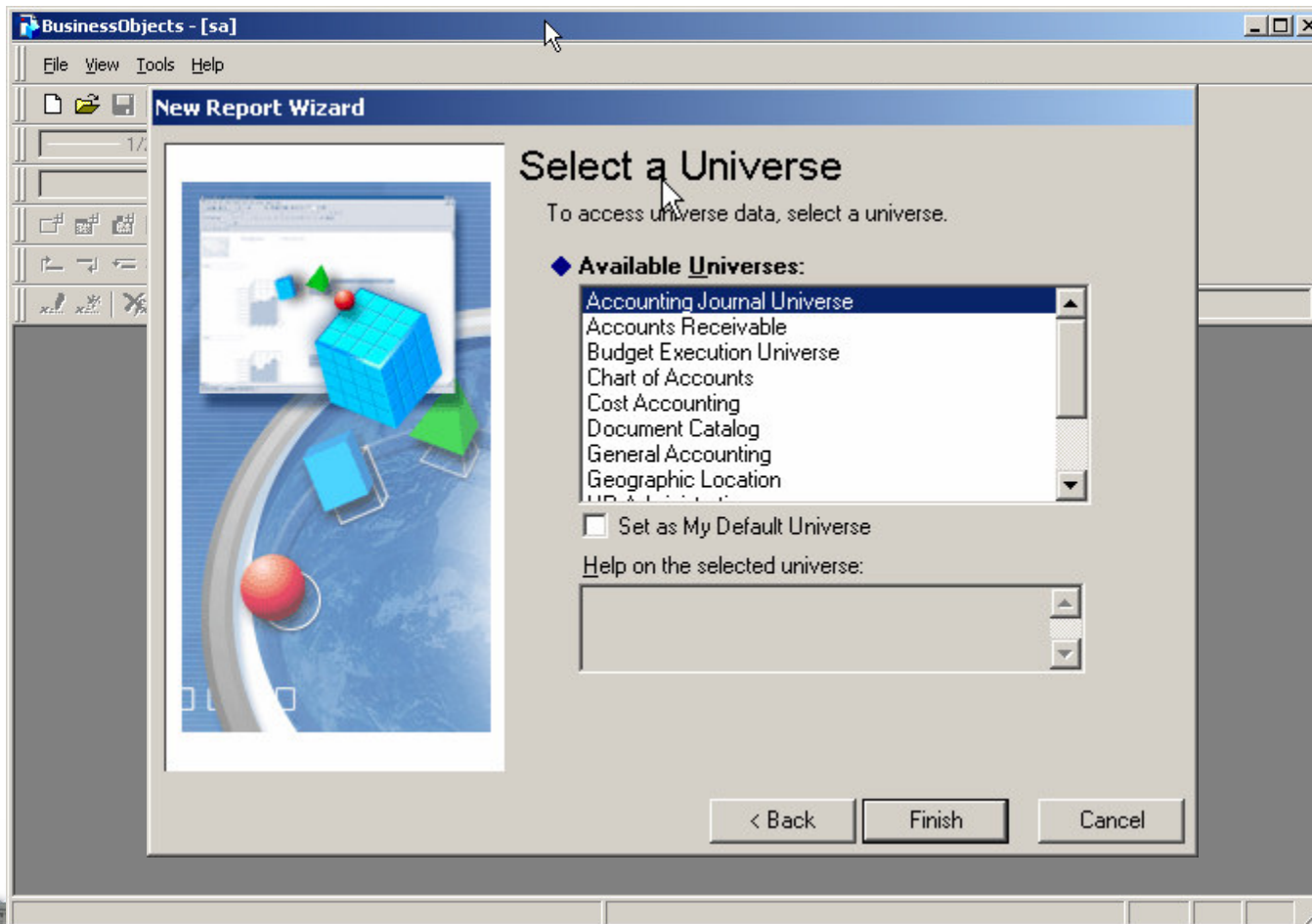


Use in Offline Mode

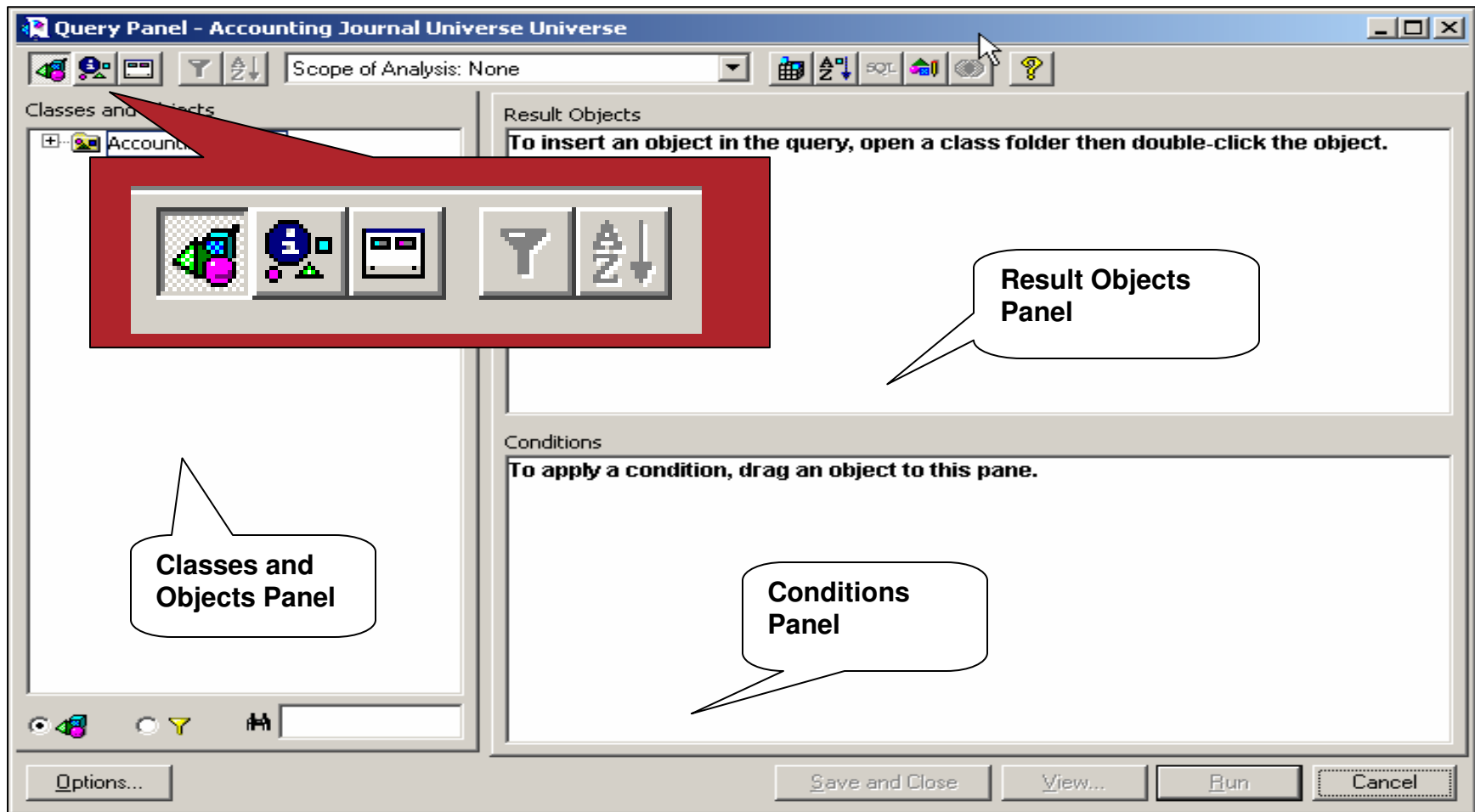
If your attempt to log in fails on a number of consecutive occasions you will 'strike out', the default 'strike out' is set to 3 tries. Business Objects will not allow you access until your Business Objects Supervisor has reset your login.

Building a Query

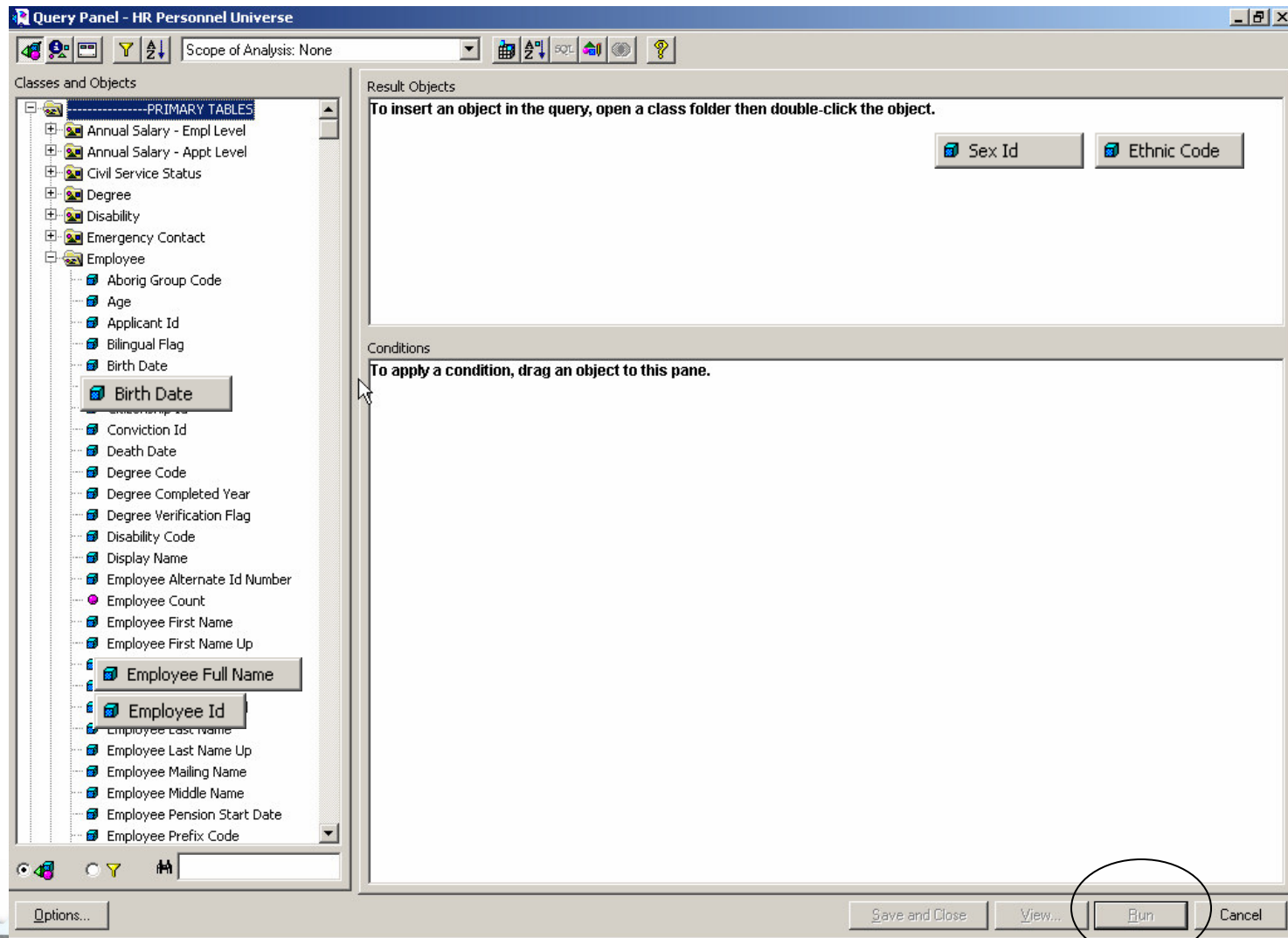
Creating a new document



The Query Panel



Building a Query



Refreshing a Query

BusinessObjects - Document2 - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

1/20 pt

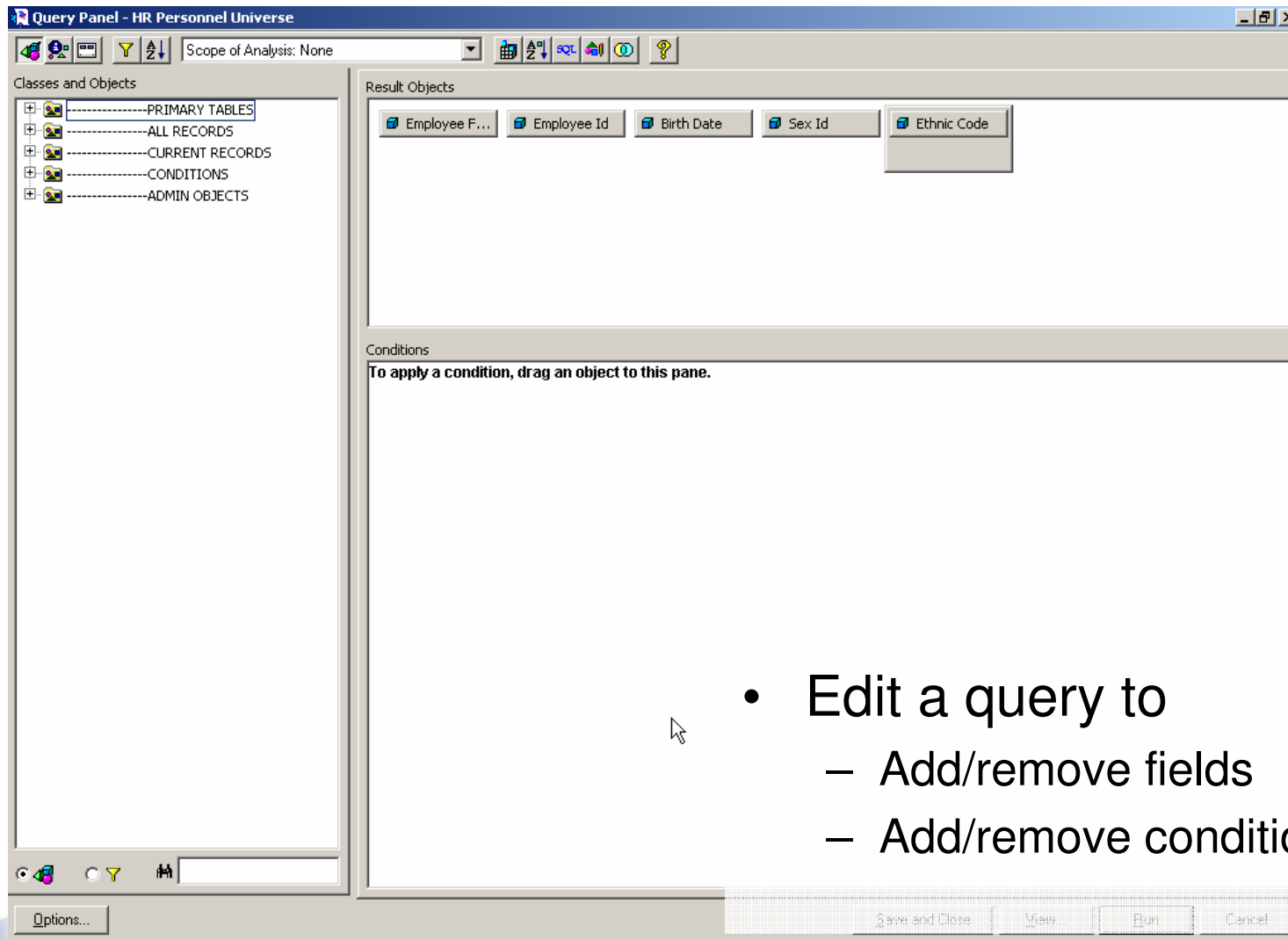
Report Title

- Results fields show up in order they were added to results fields section
- Refresh query to get the latest results

Employee Full Name	Birth Date	Employee Id	Ethnic Code	Sex Id
Alandy, Dawn R	9/27/1956	333781234	W	F
Alec, Smith George	9/29/1981	111101923	W	M
Allan, Brown Jeffrey	6/7/1979	111182633	B	M
Anderson, Debbie Sara	4/18/1950	111000009	A	F
Andrews, Christopher John		555100009		N
Anfanger, John Mark	7/7/1963	222111321	W	M
Arden, Muriel Elizabeth		555100011		N
Barasch, Matthew Daniel	12/14/1960	222223034	A	M
Black, Gary John	3/19/1962	111252838	W	M
Boughton, Jan G	4/8/1978	333769009	W	F
Boughton, Jan Joyce	4/3/1966	111000015	B	M
Bowen, Beverly Ann	4/30/1965	111000014	W	F
Boyer, Kristine D	2/23/1972	333112222	W	F
Brady, Mike V	6/13/1965	333564512	W	M
BRINKMAN, JAMES MICHAEL		562334444		N
Burton, Stephen Jon	10/5/1960	111000007	B	M
Cahn, Steven Joseph	9/8/1977	222182548	A	M
Caligagan, Agnes P	7/11/1955	333887777	W	F
Candelaria, Jerry C	9/27/1980	333010001	A	M

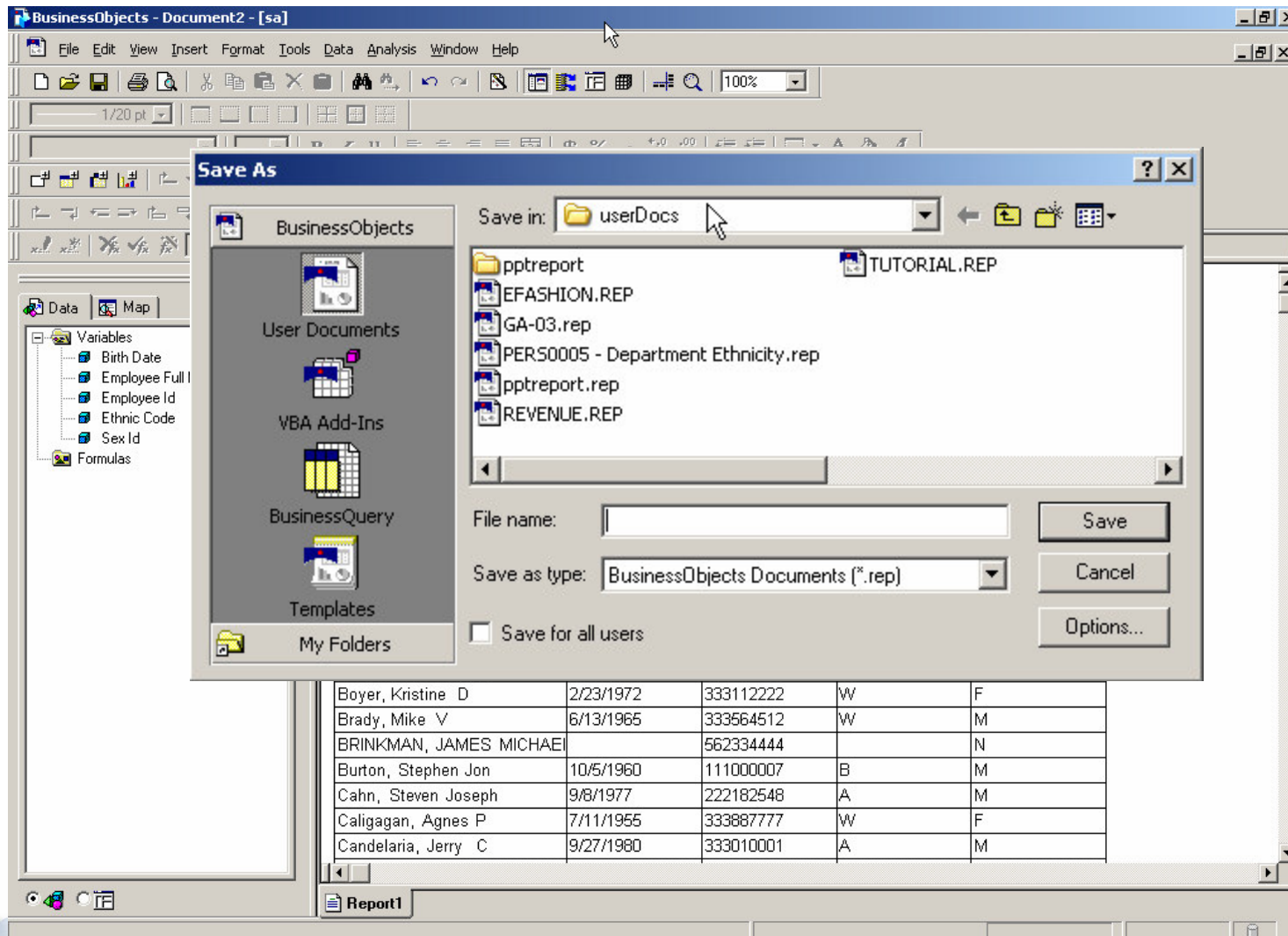
Report1

Editing a Query



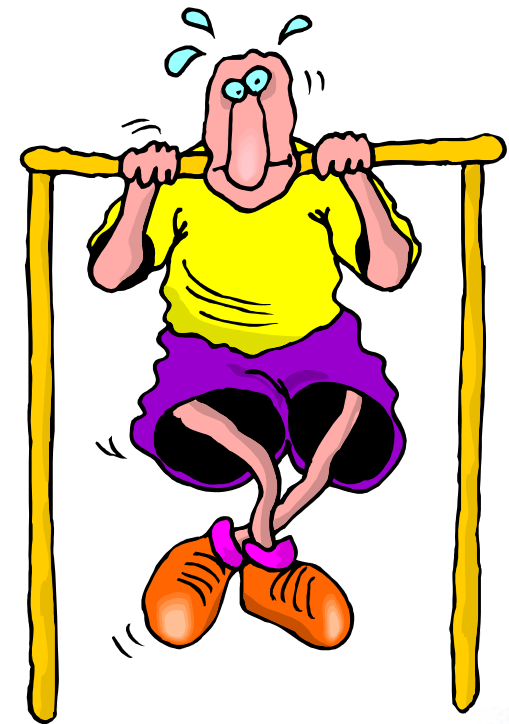
- Edit a query to
 - Add/remove fields
 - Add/remove conditions

Saving a Query



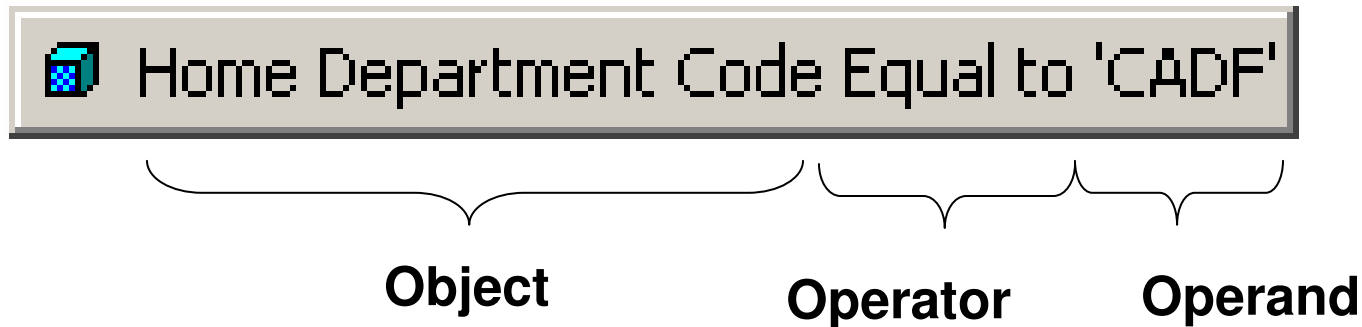
Workshop 1a

- Set up:
 - View -> Toolbars
 - Add: Formatting, Formula
- Create a query
 - Choose universe: Accounts Receivable
 - Select fields:
 - Vendor Customer Headquarters – Headquarters Account Code
 - Accounting Journal – Pstng Amount
 - Posting Code – Posting Code
- Save query



Query Conditions

- Restricting data through applying conditions
- Conditions are constructed the following way:



- Can be predefined or created ad-hoc for specific report
- Can be simple: 'object equals value' or more complex (values in between, prompts, etc)

Query Conditions

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

100% 1/20 pt

Report Title

Birth Date	Employee Id	Ethnic Code	Sex Id	Home Departme
9/27/1934	333442343	W	F	CDCE
9/27/1945	333004565	W	F	CDCE
4/6/1955	333669090	W	F	CDCE
8/29/1956	333992345	B	F	CDCE
9/27/1956	333781234	W	F	CDCE
6/13/1965	333564512	W	M	CDCE
8/13/1965	333435656	W	M	CDCE
9/8/1966	333002342	W	F	CDCE
9/27/1966	333221245	H	N	CDCE
11/12/1966	333812725	W	F	CDCE
1/1/1967	333221271	B	F	CDCE
1/12/1967	333774567	W	F	CDCE
7/8/1967	333627878	B	M	CDCE
2/23/1972	333112222	W	F	CDCE
5/22/1976	333050109	H	F	CDCE
9/11/1976	333673345	W	M	CDCE
6/3/1977	333672314	H	F	CDCE
7/21/1977	333906783	H	F	CDCE
8/23/1977	333442527	B	F	CDCE
1/13/1978	333461257	W	M	CDCE
8/25/1978	111000001	W	M	CDCE
8/27/1978	333221299	A	M	CDCE

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Formulas

Report1

Prompts

- Prompts allow user to enter values for conditions during runtime
 - Each time report is run, different values can be entered
 - User can choose from values list (no typos)
- Reduces maintenance for reports/documents
- Examples:
 - Fiscal Year
 - Reporting period
 - Department/Unit

Prompts

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

100% 1/20 pt

Report Title

Birth Date	Employee Id	Ethnic Code	Sex Id	Home Departme
5/8/1950	333785656	B	M	CDFP
5/23/1954	333843920	W	F	CDFP
12/22/1954	333450056	A	F	CDFP
7/11/1955	333887777	W	F	CDFP
3/4/1956	333553400	A	M	CDFP
4/7/1959	333803290	W	M	CDFP
3/4/1967	333099008	W	F	CDFP
8/13/1973	333998747	W	M	CDFP
8/6/1974	333754324	A	M	CDFP
8/1/1976	333167872	B	M	CDFP
7/9/1977	333781251	B	M	CDFP
4/8/1978	333769009	W	F	CDFP
8/6/1978	333097483	B	F	CDFP
11/12/1978	333997475	W	M	CDFP
12/23/1978	333727609	W	M	CDFP
4/6/1979	333458989	B	M	CDFP
9/27/1980	333010001	A	M	CDFP
11/7/1980	333094787	W	M	CDFP
11/23/1980	333098790	W	M	CDFP
2/6/1981	333750876	W	M	CDFP
5/6/1987	333778278	W	M	CDFP

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Formulas

Report1

Wildcard Prompts

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Formulas

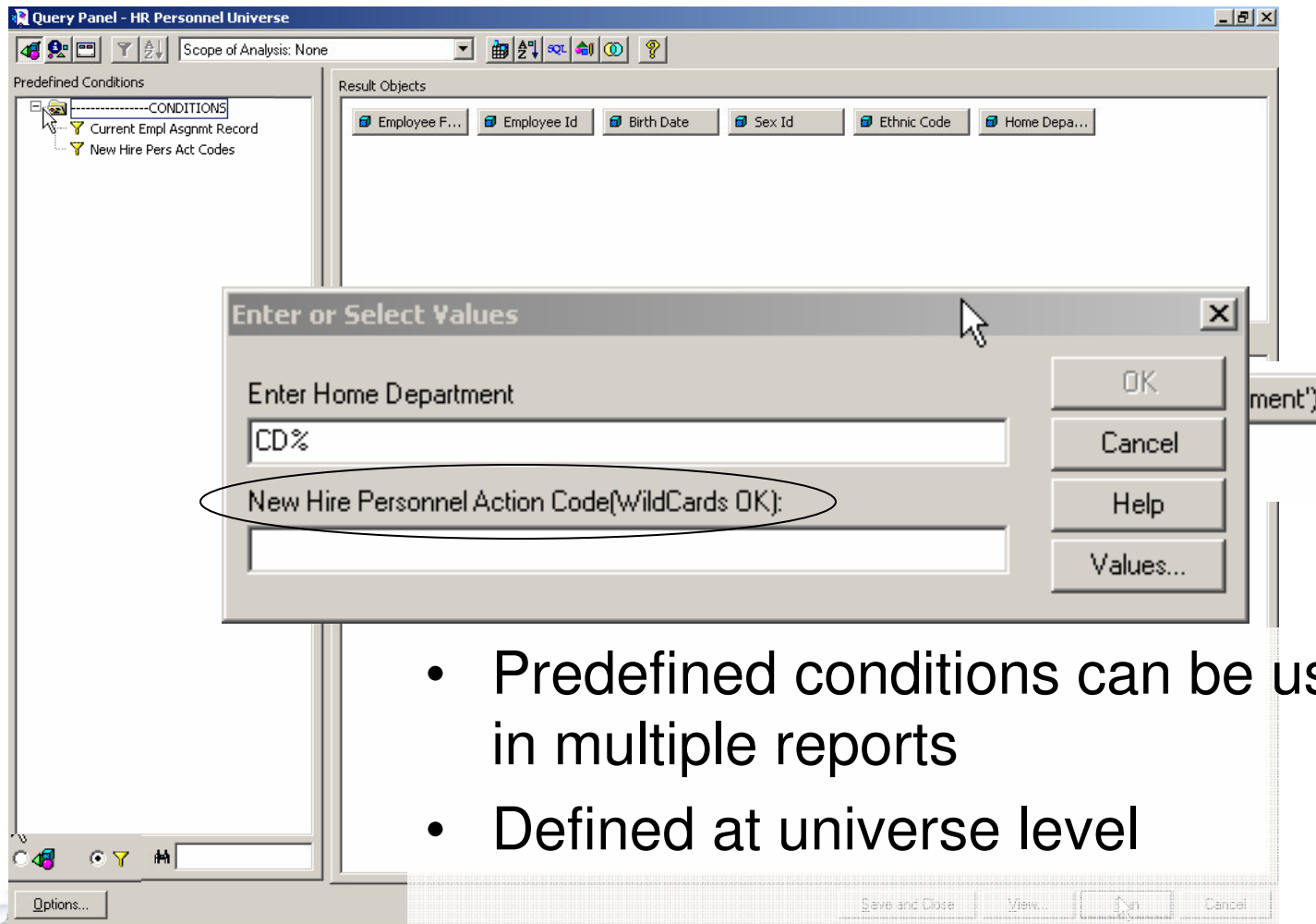
- Equal to
- Different from
- Greater than
- Greater than or equal to
- Less than
- Less than or equal to
- Between
- Not between
- In list
- Not in list
- Is null
- Is not null
- Matches pattern
- Different from pattern
- Both
- Except

Report Title

Ethnic Code	Sex Id	Home Departme		
W	F	CDCE		
W	F	CDCE		
B	M	CDFP		
A	F	CDJA		
W	M	CDPH		
W	M	CDPH		
W	F	CDFP		
A	F	CDFP		
W	F	CDCE		
W	M	CDPE		
W	F	CDFP		
H	F	CDPE		
W	M	CDPE		
A	M	CDFP		
B	F	CDCE		
W	F	CDCE		
B	M	CDJA		
4/7/1959	333803290	W	M	CDFP
1/1/1960	111000031	W	M	CDPE
12/14/1960	222223034	A	M	CDJA
3/19/1962	111252838	W	M	CDPE
12/26/1962	222274049	H	F	CDPH

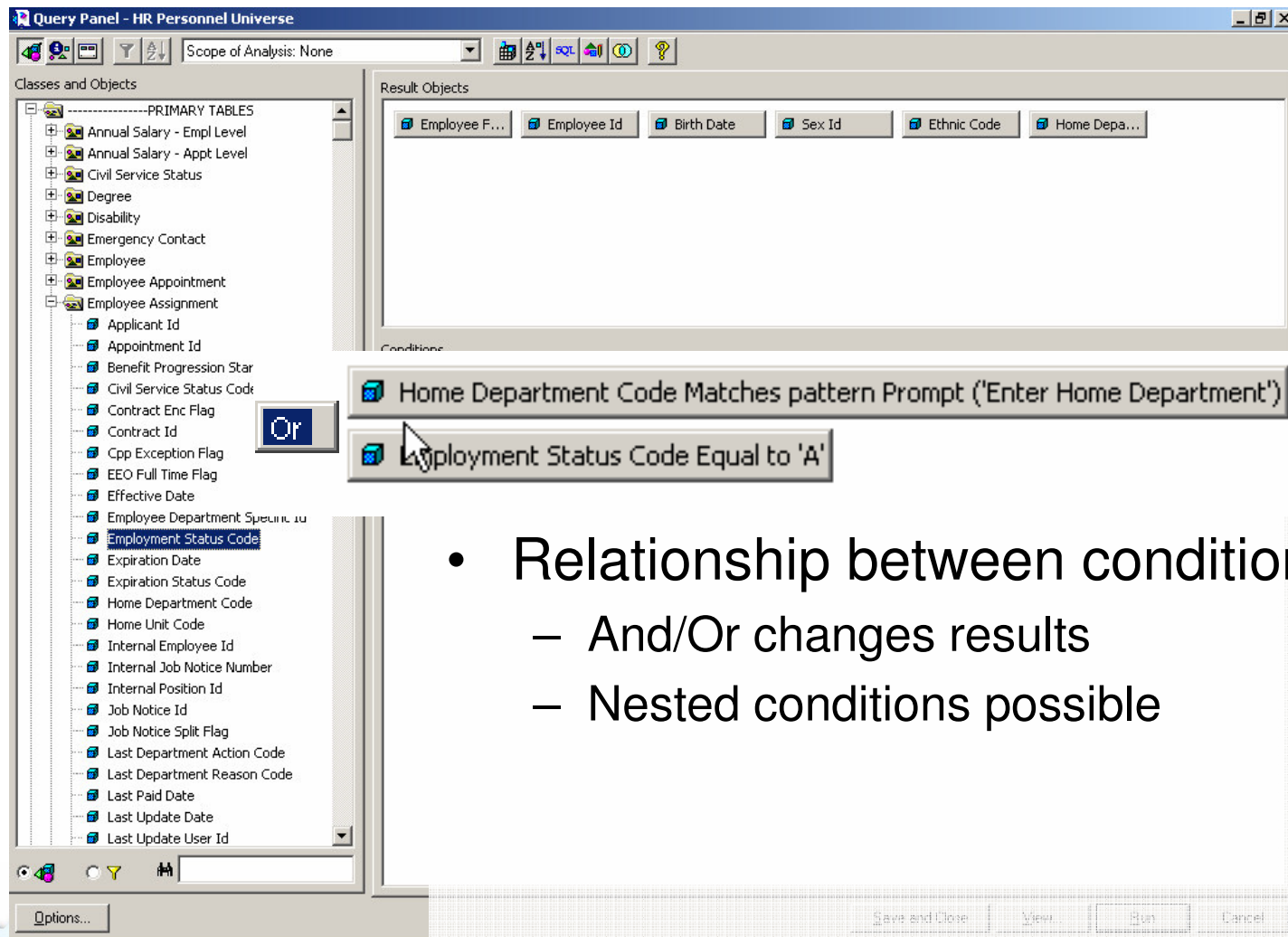
Report1

Predefined condition Objects



- Predefined conditions can be used in multiple reports
- Defined at universe level

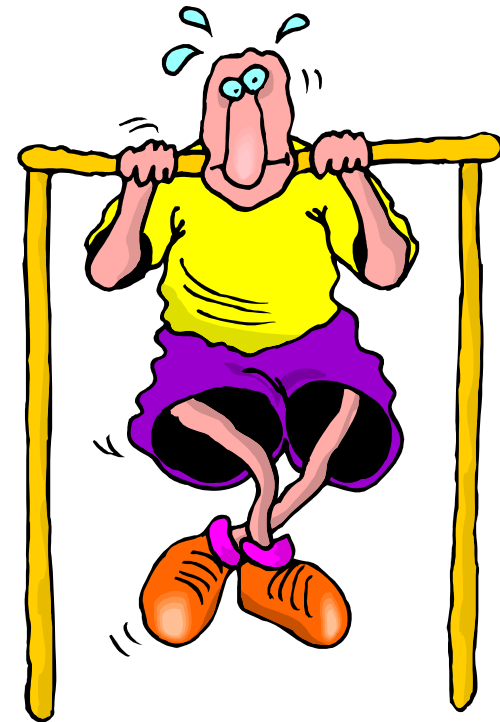
Logical Operators



- Relationship between conditions:
 - And/Or changes results
 - Nested conditions possible

Workshop 2 – Add conditions

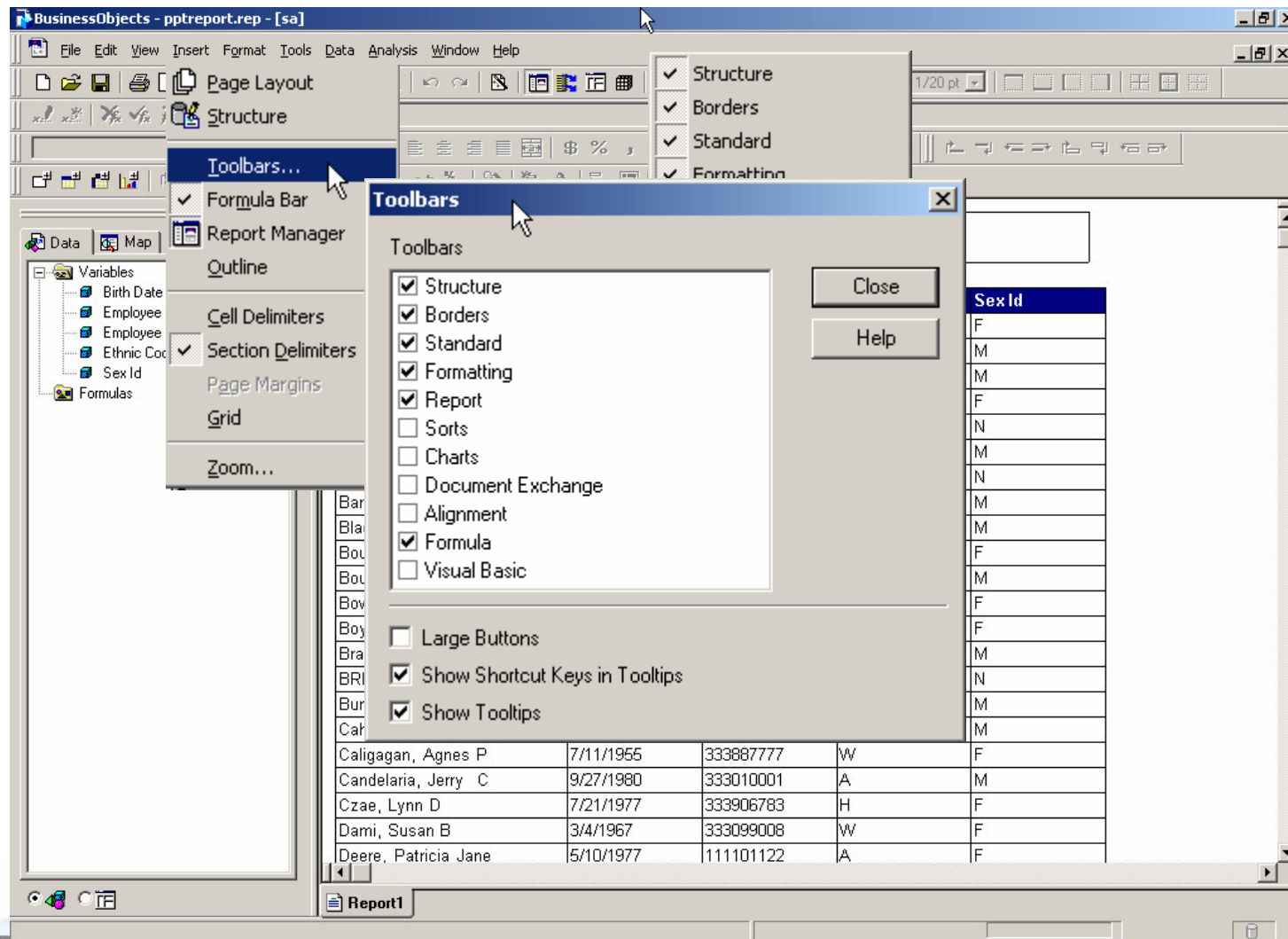
- Open Report 1
- Add condition to only include amounts between 1000 and 5000 dollar
- Add a condition to only include Vendor Customer Headquarters Account Codes like 'ALA'
- Modify previously added condition to be a prompt
- Save query



Manipulating Data

- Use report toolbars to change data display
- Add/remove columns
- Resize columns
- Move tables
- Format cell layout

Report Manager Toolbars



Report Manager Toolbars

The screenshot shows the BusinessObjects Report Manager interface. The title bar reads 'BusinessObjects - pptreport.rep - [sa]'. The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Analysis, Window, and Help. The toolbar below the menu bar contains various icons for report design and formatting. A green arrow points to the 'Font' toolbar, which is highlighted with a green oval. The 'Font' toolbar includes icons for font face, size, bold, italic, underline, color, and background color. Below the toolbars, a table of employee data is displayed. The table has columns for Name, Date of Birth, Employee ID, and other details. The report is titled 'Report1' in the bottom left corner.

Anderson, Debbie Sara	4/18/1950	111000009	A	F
Andrews, Christopher John		555100009		N
Anfanger, John Mark	7/7/1963	222111321	W	M
Arden, Muriel Elizabeth		555100011		N
Barasch, Matthew Daniel	12/14/1960	222223034	A	M
Black, Gary John	3/19/1962	111252838	W	M
Boughton, Jan G	4/8/1978	333769009	W	F
Boughton, Jan Joyce	4/3/1966	111000015	B	M
Bowen, Beverly Ann	4/30/1965	111000014	W	F
Boyer, Kristine D	2/23/1972	333112222	W	F
Brady, Mike V	6/13/1965	333564512	W	M
BRINKMAN, JAMES MICHAEL		562334444		N
Burton, Stephen Jon	10/5/1960	111000007	B	M
Cahn, Steven Joseph	9/8/1977	222182548	A	M
Caligagan, Agnes P	7/11/1955	333887777	W	F
Candelaria, Jerry C	9/27/1980	333010001	A	M
Czae, Lynn D	7/21/1977	333906783	H	F
Dami, Susan B	3/4/1967	333099008	W	F
Deere, Patricia Jane	5/10/1977	111101122	A	F

Report Manager

The screenshot displays the Report Manager application window. The main workspace shows a report design with a tree view on the left containing 'Report1', 'Main Section', 'Cell', and 'Table 1'. A 'Variables' pane on the left lists 'Birth Date', 'Employee Full Name', 'Employee Id', 'Ethnic Code', 'Sex Id', and 'Formulas'. The bottom of the window shows a data preview table with columns 'Id', 'Ethnic Code', and 'Sex Id'. The table contains 20 rows of data.

Id	Ethnic Code	Sex Id
	W	F
	W	M
	B	M
	A	F
		N
	W	M
		N
	A	M
	W	M
	W	F
	B	M
	W	F
	W	F
	W	M
		N
	B	M
	A	M
	W	F
	A	M
	H	F
	W	F
	A	F

Adding Columns

BusinessObjects - pptreport.rep - [sa]

File Edit View

Birth Date Employee Id Ethnic Code Sex Id

Variables

Birth Date

Formulas

Birth Date	Employee Id	Ethnic Code	Sex Id	Sex Id
9/27/1934	333442343	W	F	
9/27/1945	333004565	W	F	
11/30/1949	111000005	H	M	
4/18/1950	111000009	A	F	
5/8/1950	333785656	B	M	
10/14/1950	222263328	A	F	
12/1/1950	222172631	W	M	
2/5/1954	222141721	W	M	
5/23/1954	333843920	W	F	
12/22/1954	333450056	A	F	
4/6/1955	333669090	W	F	
4/23/1955	111000013	A	F	
7/7/1955	111000029	W	M	
7/11/1955	333887777	W	F	
11/3/1955	111000022	A	M	
12/19/1955	111000004	H	F	
12/19/1955	111000021	W	M	
12/19/1955	111000030	H	F	
12/19/1955	111000032	W	M	
3/4/1956	333553400	A	M	
8/29/1956	333992345	B	F	
Deere, Patricia Jane	5/10/1977	111101122	A	F
Deere, Patricia Jane	111101122	A	F	

Report1

Deleting Columns

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

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Report Title

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Formulas

Employee Id	Ethnic Code	SexId	Home Departme
111000001	W	M	CDCE
333002342	W	F	CDCE
333004565	W	F	CDCE
333050109	H	F	CDCE
333112222	W	F	CDCE
333221232	H	F	CDCE
333221245	H	N	CDCE
333221271	B	F	CDCE
333221299	A	M	CDCE
333435656	W	M	CDCE
333442343	W	F	CDCE
333442527	B	F	CDCE
333461257	W	M	CDCE
333564512	W	M	CDCE
333627878	B	M	CDCE
333669090	W	F	CDCE
333672314	H	F	CDCE
333673345	W	M	CDCE
333764321	H	F	CDCE
333774567	W	F	CDCE
333781234	W	F	CDCE
333812725	W	F	CDCE

Report1

- Select Column
- Hit Delete button

Resizing Columns and Rows

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

100% 1/20 pt

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Data Map

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id

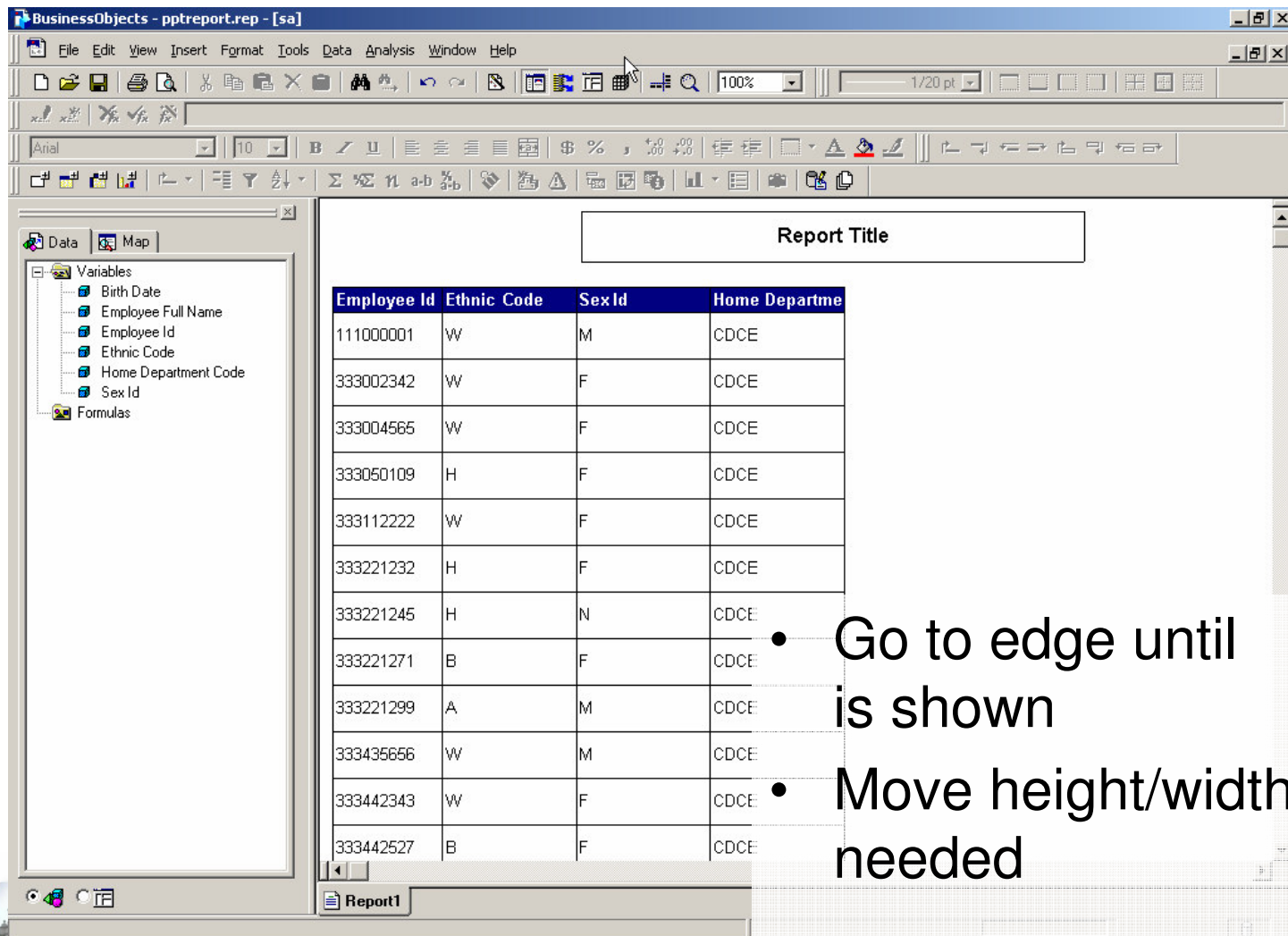
Formulas

Employee Id	Ethni	Sex Id
111000001		
333002342		
333004565		
333050109	W	M
333112222	W	F
333221232	W	F
333221245	W	F
333221271	W	F
333221299	W	F
333435656	W	F
333442343	W	F
333442527	H	F
333461257	H	F
333564512	W	F
333627878	W	F
333669090	H	F
333672314	H	F
333673345	H	F
333764321	F	CDCE
333774567	F	CDCE
333781234	F	CDCE
333812725	F	CDCE

Report1



Manual Resizing Row Height



BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

100% 1/20 pt

Report Title


Employee Id	Ethnic Code	Sex Id	Home Departme
111000001	W	M	CDCE
333002342	W	F	CDCE
333004565	W	F	CDCE
333050109	H	F	CDCE
333112222	W	F	CDCE
333221232	H	F	CDCE
333221245	H	N	CDCE
333221271	B	F	CDCE
333221299	A	M	CDCE
333435656	W	M	CDCE
333442343	W	F	CDCE
333442527	B	F	CDCE

- Go to edge until is shown
- Move height/width as needed

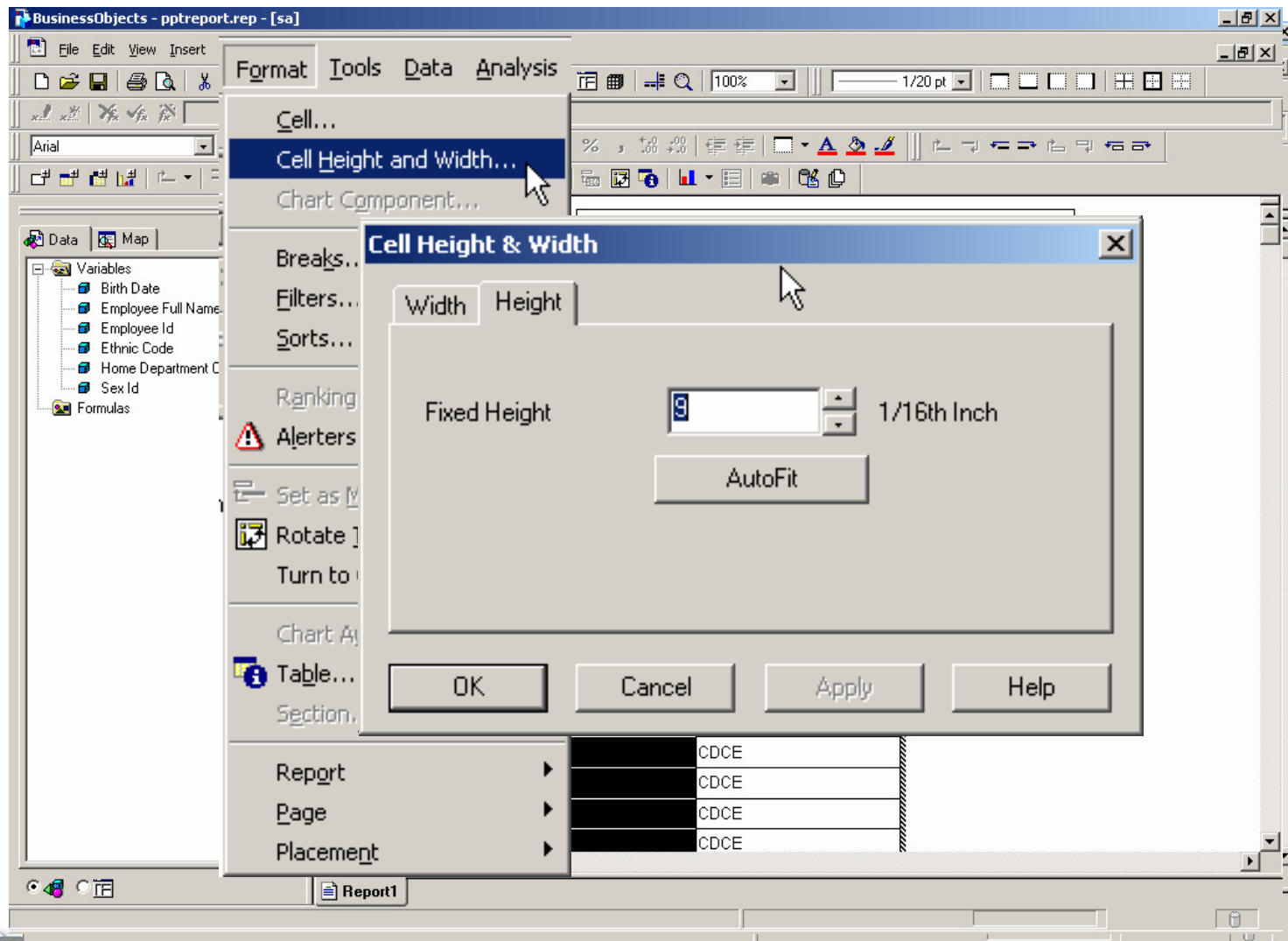
Automatic Resizing Columns and Rows

Report Title

Employee Id	Ethnic Code	Sex Id	Home Department
111000001			
111000001			
111000001	W	M	CDCE
333002342			
333002342	W	F	CDCE
333004565	W	F	CDCE
333050109	H	F	CDCE
333112222	W	F	CDCE
333221245	H		
333221232	H	F	CDCE
333221271	B	F	CDCE
333221299	A	M	CDCE
333442343	W	M	CDCE
333442343	W	F	CDCE
333442343	W	F	CDCE

- Go to edge until  is shown
- Double click and height/width will be updated automatically

AutoFit Resizing Columns and Rows



Moving Columns

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

100% 1/20 pt

Report Title

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Formulas

Employee Id	Home Departme	Ethnic Code	Sex Id
111000001	CADF	W	M
111000002	CADF	H	F
111000003	CADF	B	M
111000004	CADF	H	F
111000005	CADF	H	M
111000006	CADF	B	F
111000007	CADF	B	M
111000008	CADF	H	M
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000015	CADF	B	M
111000016	CADF	A	F
111000017	CADF	B	F
111000018	CADF	W	M
111000019	CADF	W	F
111000020	CADF	A	M
111000021	CADF	W	M
111000022	CADF	A	M

Report1

Last Exec: 11/10/2004 08:44 AM

NUM

Changing Column Titles

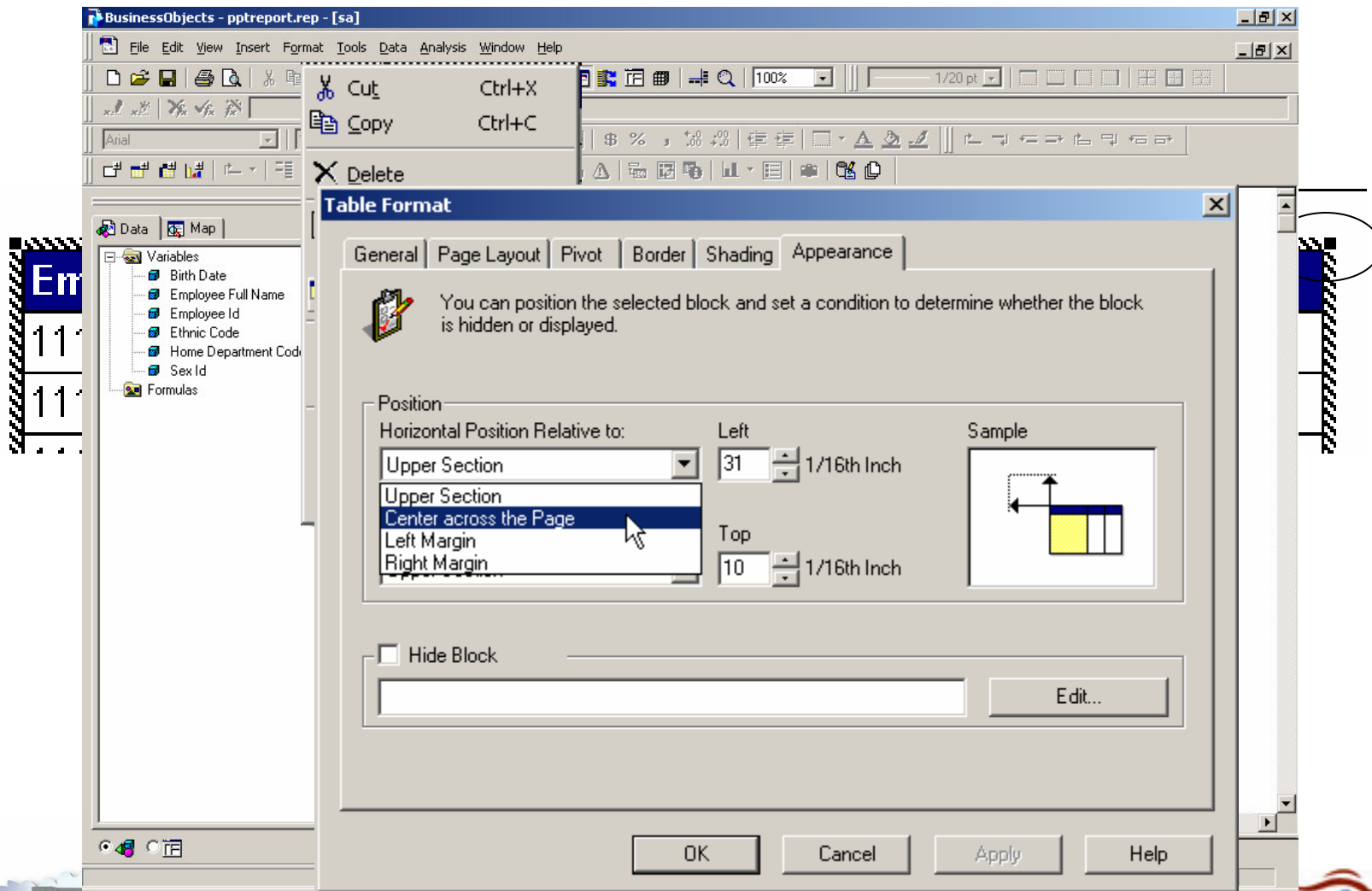
The screenshot shows the BusinessObjects report editor interface. The main window displays a report titled "Report Title" which contains a table with the following data:

Employee Id	Home Dept	Ethnic Code	Sex Id
111000001	CADF	W	M
111000002	CADF	H	F
111000003	CADF	B	M
111000004	CADF	H	F
111000005	CADF	H	M
111000006	CADF	B	F
111000007	CADF	B	M
111000008	CADF	H	M
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000015	CADF	B	M
111000016	CADF	A	F
111000017	CADF	B	F
111000018	CADF	W	M
111000019	CADF	W	F
111000020	CADF	A	M
111000021	CADF	W	M
111000022	CADF	A	M

The left sidebar shows the "Variables" pane with the following items: Birth Date, Employee Full Name, Employee Id, Ethnic Code, Home Department Code, Sex Id, and Formulas. The bottom status bar indicates "Last Exec: 11/10/2014 05:44 AM".

- Go to cell with title and type the value needed
- Or apply a formula

Moving Tables – Two ways



Page Layout Mode

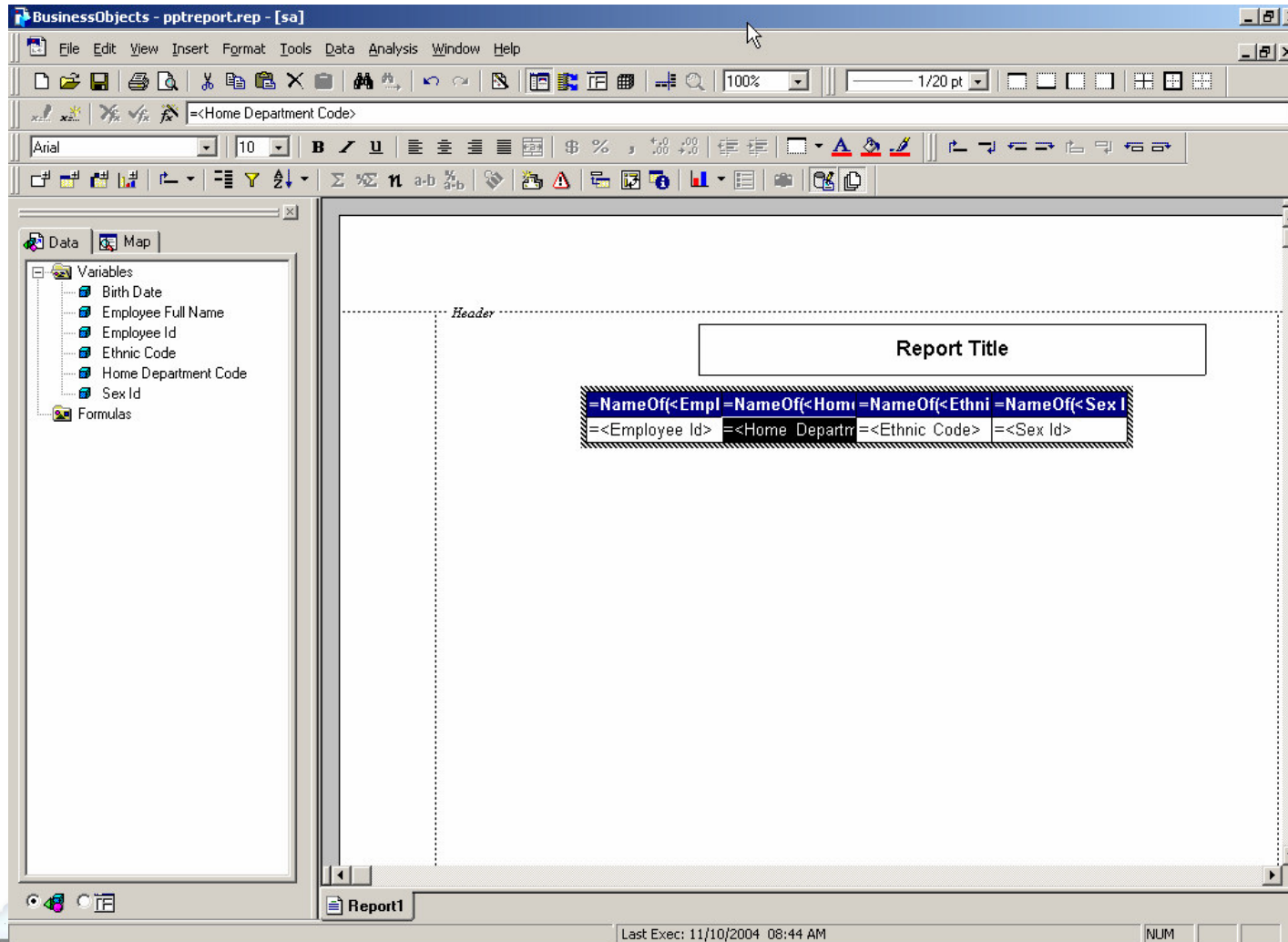
The screenshot shows the BusinessObjects Page Layout Mode interface. The window title is "BusinessObjects - pptreport.rep - [sa]". The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Analysis, Window, and Help. The toolbar contains various icons for report design, including a ruler, zoom, and layout tools. The main workspace displays a report design with a header section labeled "Header" containing a "Report Title" box. Below the header is a table with the following data:

Employee Id	Home Departme	Ethnic Code	Sex Id
111000001	CADF	W	M
111000002	CADF	H	F
111000003	CADF	B	M
111000004	CADF	H	F
111000005	CADF	H	M
111000006	CADF	B	F
111000007	CADF	B	M
111000008	CADF	H	M
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000015	CADF	B	M
111000016	CADF	A	F
111000017	CADF	B	F
111000018	CADF	W	M

At the bottom of the workspace, there is a status bar showing "Report1", "Page 1", "1/3", and "Last Exec: 11/10/2004 08:44 AM".

- Page lay out mode shows how report will look on paper

Structure Mode



Inserting Text Cells

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

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Data Map

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Formulas

Header

HRM0010

Report Title

Employee Id	Home Departme	Ethnic Code	Sex Id
111000001	CADF	W	M
111000002	CADF	H	F
111000003	CADF	B	M
111000004	CADF	H	F
111000005	CADF	H	M
111000006	CADF	B	F
111000007	CADF	B	M
111000008	CADF	H	M
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000015	CADF	B	M
111000016	CADF	A	F
111000017	CADF	B	F
111000018	CADF	W	M

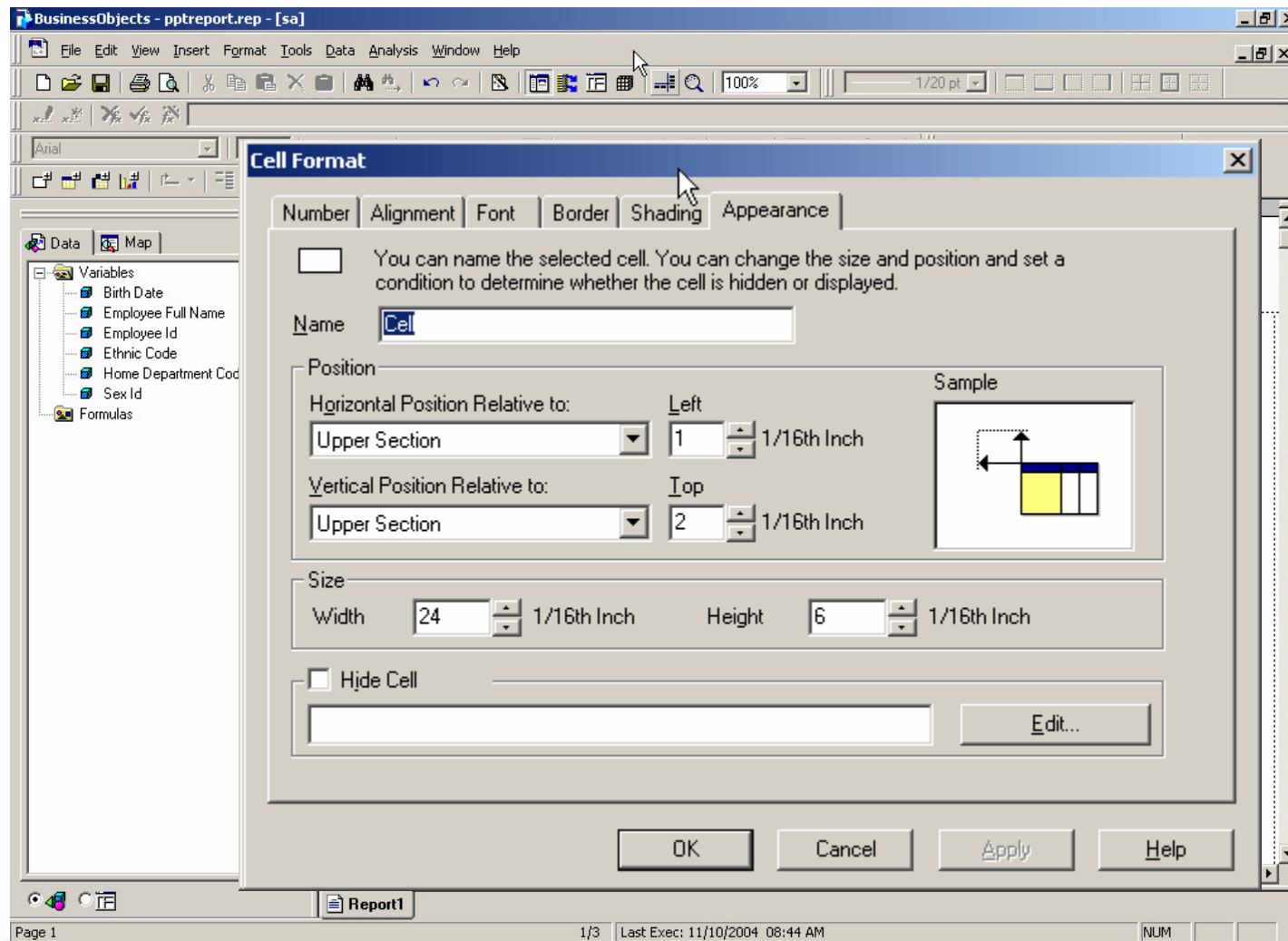
Report1

Page 1 1/3 Last Exec: 11/10/2004 08:44 AM NUM

Formatting Cells

- Cells can be formatted like in any other Microsoft program
- Modify
 - Cell height/width
 - Font
 - Number/Date etc
 - Appearance (every page, where on page)
 - Etc.

Formatting Cells



Cell Functions

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

Cell...

- Special Field
 - Date and Time
 - Page Numbers
 - Page #
 - Page # of #
 - Page # of Pages()
 - Global Filters
 - Drill Filters
 - Query Prompt...
- Row...
- Column...
- Chart Components
- Break
- Filter...
- Sorts
- Table...
- Crosstab...
- Chart...
- Report
- Picture...
- Object...

of " & NumberOfPages()

PAGE: 1 of 2

Em	Id	Total Salary	Running Total
And	9	37,500.00	37,500.00
Bo	5	37,500.00	75,000.00
Bo	4	38,000.00	113,000.00
Bur	7	35,000.00	148,000.00
Delaney, Donna Alice	111000010	35,000.00	183,000.00
Espinoza, maria Alonzo	111000012	37,500.00	220,500.00
Fountain, Deborah Mary	111000006	37,500.00	258,000.00
Hamilton, Billy Noel	111000001	35,000.00	293,000.00
Lynch, George Bill	111000008	38,000.00	331,000.00
Malcolm, Currie Mary	111000002	38,000.00	369,000.00
Muto, Miho Niki	111000011	38,000.00	407,000.00
Rodriguez, Judy Carmen	111000004	35,000.00	442,000.00
Rodriguez, Tom Jay	111000005	38,000.00	480,000.00
Zamucen, Nick Allen	111000003	37,500.00	517,500.00

Report1

Page 1

1/2 Last Exec: 11/12/2004 04:17 PM

- Formulas (functions) can be added to stand alone cells
- Special Standard functions are available

Formatting Tables

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

100% 1/20 pt

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Data Map

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Formulas

Header

Name: HRM0010

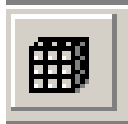
Report Title

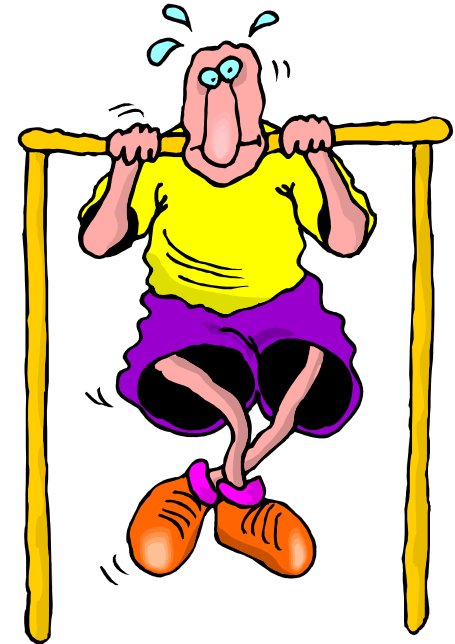
Employee Id	Home Departme	Ethnic Code	Sex Id
111000001	CADF	W	M
111000002	CADF	H	F
111000003	CADF	B	M
111000004	CADF	H	F
111000005	CADF	H	M
111000006	CADF	B	F
111000007	CADF	B	M
111000008	CADF	H	M
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000015	CADF	B	M
111000016	CADF	A	F
111000017	CADF	B	F
111000018	CADF	W	M

Report1

Page 1 1/3 Last Exec: 11/10/2004 08:44 AM NUM

Workshop 3

- Modify the existing report layout
- Change appearance
 - Resize columns
 - Add sorts, columns
 - Add a title
- Add cell: Last run date
 - Hints:
 - 1. Insert Blank Cell
 - 2. Get data provider name ->  (definition)
 - 3. Add formula
- Save report



Presentation Styles

- Multiple ways to display data:
 - Table
 - Chart
 - Crosstab
- Tables can be turned into charts, crosstabs into tables etc.

Block Styles

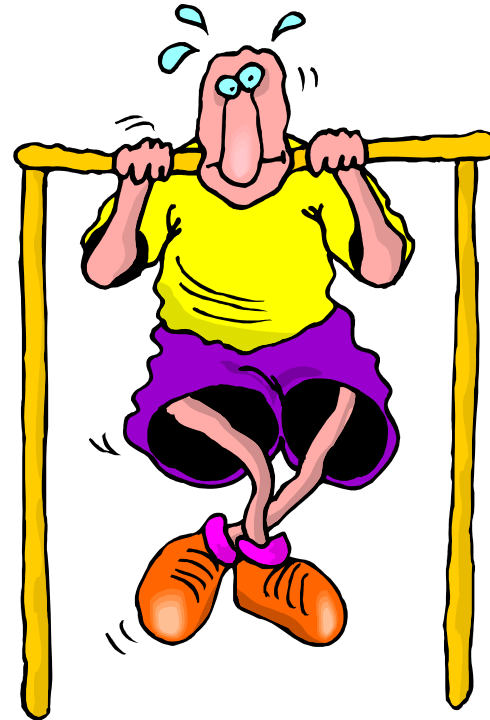
Header

Name: HRM0010

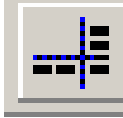
	CADF	CDCE	CDFP	CDJA	CDPE	CDPH
F	474,500.00	1,027,000.00	229,000.00	129,000.00	26,700.00	101,000.00
M	479,500.00	394,500.00	588,500.00	695,000.00	58,200.00	232,478.00
N		60,000.00			9,700.00	

Workshop 4

- Add a table to report 1 and turn that into a crosstab
- Add a table and turn that into a chart
- Format the table to include a footer with the total for Posting Amounts.
- Add a count for the Headquarters Code
- Save query/report



Slice and Dice

- Slice and Dice: 
 - Allows to switch data in report
 - Allows to add/remove breaks, calculations



» View sections

Applying breaks and sections

- Break:
 - Breaks up data in a table or crosstab according to values
 - Within a table ! Table remains 1 piece
- Section:
 - Actually breaks up the table. Although table is still considered one entity, actions can be preformed on section areas
 - Sections can be seen through 'Structure View'
 - Tables/Charts can be added per section

Using Slice and Dice

The screenshot shows the BusinessObjects report designer interface. The title bar reads "BusinessObjects - pptreport.rep - [sa]". The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Analysis, Window, and Help. The toolbar contains various icons for file operations, editing, and formatting. Below the toolbar, the font settings are set to Arial, size 10. The left pane shows a tree view with "Variables" and "Formulas". The "Variables" list includes Birth Date, Employee Full Name, Employee Id, Ethnic Code, Home Department Code, and Sex Id. The main workspace shows a report layout with a header section containing "Name: HRM0010" and "Report Title". Below the header is a table with the following columns: Employee Id, Home Department Code, Ethnic Code, and Sex Id. The table data is partially visible, showing "111111111" under Employee Id and "RAND" under Home Department Code. The bottom status bar indicates "Table 1".

Employee Id Home Department Code Ethnic Code Sex Id

111111111 RAND 1W 1M

Break filter Sort Calculations Rank

Applying Breaks

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

100% 1/20 pt

=<Total Salary>

Arial 10 B U

Name: HRM0010

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Total Salary

Formulas

Sex Id	Total Salary	Home Department
F	474,500.00	CADF
	1,027,000.00	CDCE
	229,000.00	CDFP
	129,000.00	CDJA
	26,700.00	CDPE
	101,000.00	CDPH
F	1,987,200.00	
M	479,500.00	CADF
	394,500.00	CDCE
	588,500.00	CDFP
	695,000.00	CDJA
	58,200.00	CDPE
	232,478.00	CDPH
M	2,448,178.00	
N	60,000.00	CDCE
	9,700.00	CDPE
N	69,700.00	
Sum:	4,505,078.00	

Report1

Sectioning

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

1/20 pt 100%

Anal 12 B U

Section: Home Department Code

CADF 517,500.00

Employee Full Name	Employee Id	Total Salary
Anderson, Debbie Sara	111000009	37,500.00
Boughton, Jan Joyce	111000015	37,500.00
Bowen, Beverly Ann	111000014	38,000.00
Burton, Stephen Jon	111000007	35,000.00
Delaney, Donna Alice	111000010	35,000.00
Espinoza, maria Alonzo	111000012	37,500.00
Fountain, Deborah Mary	111000006	37,500.00
Hamilton, Billy Noel	111000001	35,000.00
Lynch, George Bill	111000008	38,000.00
Malcolm, Currie Mary	111000002	38,000.00
Muto, Miho Niki	111000011	38,000.00
Rodriguez, Judy Carmen	111000004	35,000.00
Rodriguez, Tom Jay	111000005	38,000.00
Zamucen, Nick Allen	111000003	37,500.00
Sum:		517,500.00

Section: Home Department Code

CDCE 1,421,500.00

Employee Full Name	Employee Id	Total Salary
--------------------	-------------	--------------

Report1

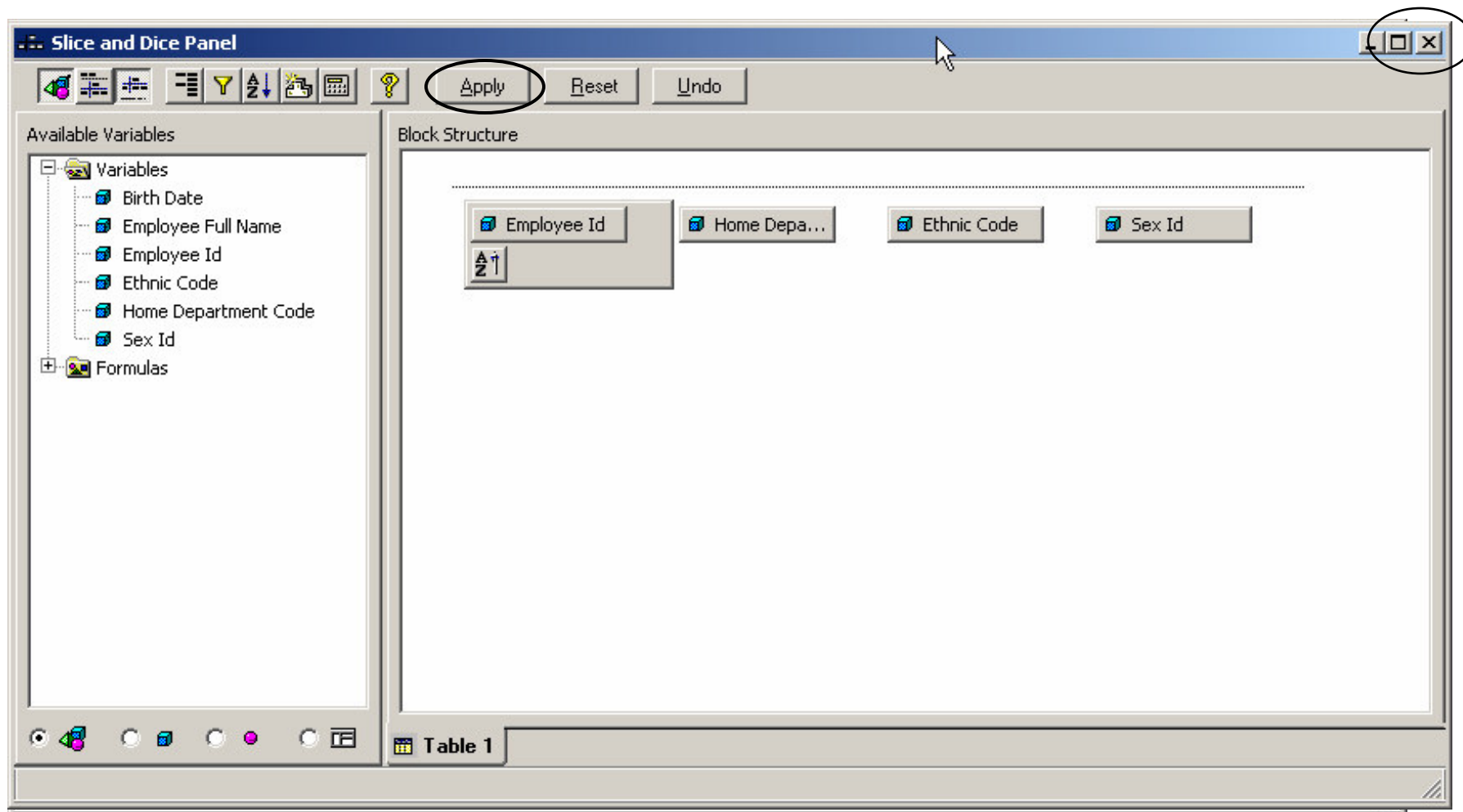
Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Lowest Salary
- Max Bonus
- Running Total
- Total Salary

Formulas

- =Sum(<Total Salary>)

Sorting Data



Managing Sorts

The screenshot shows the BusinessObjects report designer interface. The title bar indicates the report is 'pptreport.rep' in the 'sa' namespace. The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Analysis, Window, and Help. The toolbar contains various icons for report design, including filters, sorting, and layout tools. The left pane shows the 'Data' tab with a tree view of variables: Birth Date, Employee Full Name, Employee Id, Ethnic Code, Home Department Code, Sex Id, and Formulas. The main report area displays a table with the following data:

Employee Id	Home Department	Ethnic Code	Sex Id
111000002	CADF	H	F
111000004	CADF	H	F
111000006	CADF	B	F
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000016	CADF	A	F
111000017	CADF	B	F
111000019	CADF	W	F
111000025	CADF	A	F
111000001	CADF	W	M
111000003	CADF	B	M
111000005	CADF	H	M
111000007	CADF	B	M
111000008	CADF	H	M

The status bar at the bottom shows 'Page 1', '1/3', 'Last Exec: 11/10/2004 08:44 AM', and 'NUM'.

Filtering Data

The screenshot shows the BusinessObjects report designer interface. The left pane displays a tree view of variables including Birth Date, Employee Full Name, Employee Id, Ethnic Code, Home Department Code, and Sex Id. The main report area shows a header section with 'Name: HRM0010' and a 'Report Title' box. Below the header is a table with the following data:

Employee Id	Home Departme	Ethnic Code	Sex Id
111000002	CADF	H	F
111000004	CADF	H	F
111000012	CADF	H	F
111000005	CADF	H	M
111000008	CADF	H	M
111000023	CADF	H	M

Below the table, there are two bullet points:

- Note: this filters the data at the report level, not at the query level:
- Not all data retrieved from the database is displayed

Applying Calculations

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

100% 1/20 pt

=<Employee Id>

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Data Map

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Annual Salary

Formulas

Header

Insert Count

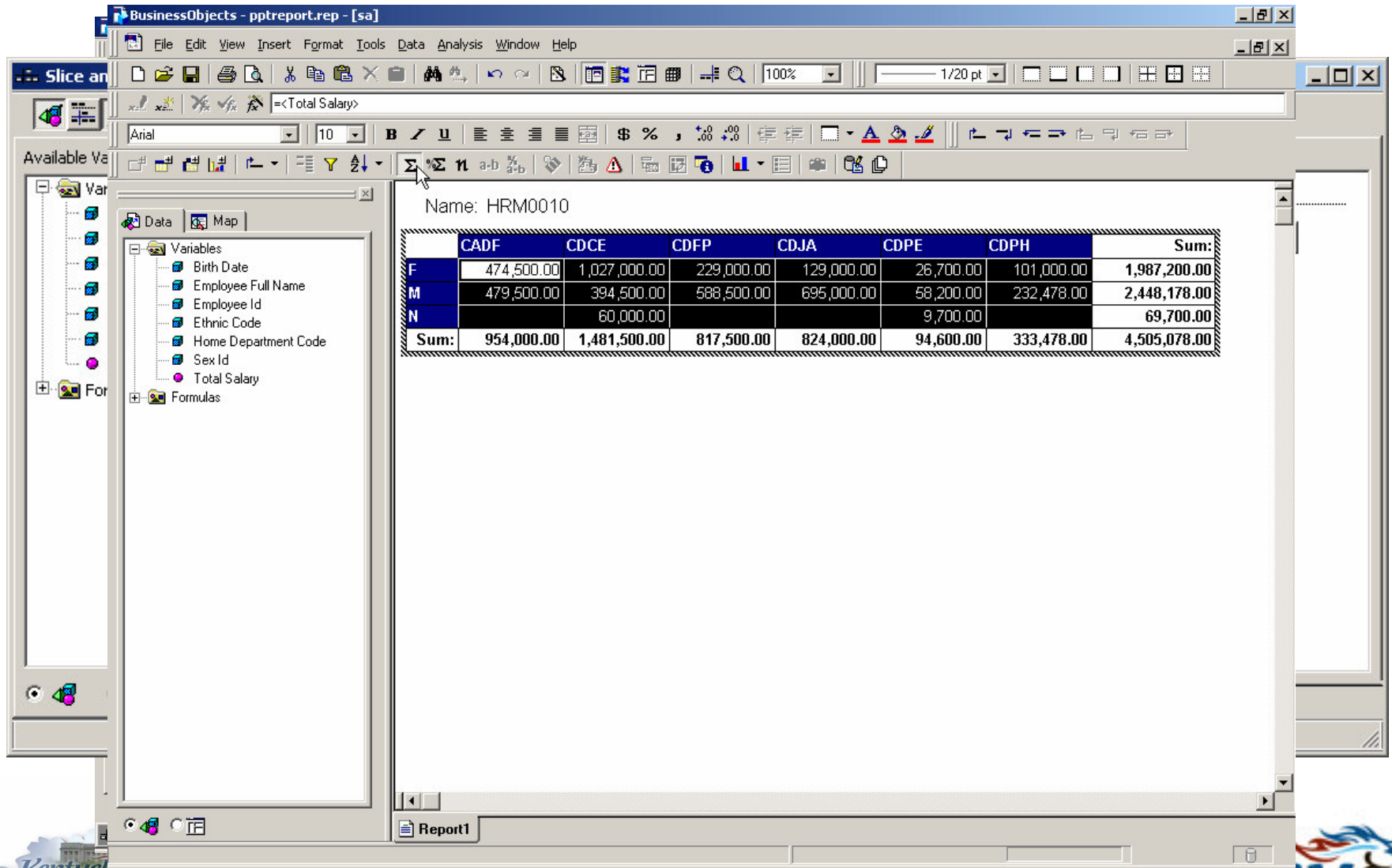
Name: FIRM0010

Report Title

Employee Id	Home Department	Ethnic Code	Sex Id	Annual Salary	Percentage
111000002	CADF	H	F	38,000.00	5.01 %
111000004	CADF	H	F	35,000.00	4.61 %
111000012	CADF	H	F	37,500.00	4.94 %
111000030	CDPE	H	F	8,500.00	1.12 %
111000033	CDPE	H	F	8,500.00	1.12 %
222151921	CDPH	H	F	24,000.00	3.16 %
222274049	CDPH	H	F	24,000.00	3.16 %
333050109	CDCE	H	F	70,000.00	9.23 %
333221232	CDCE	H	F	70,000.00	9.23 %
333672314	CDCE	H	F	64,500.00	8.50 %
333764321	CDCE	H	F	60,000.00	7.91 %
333906783	CDCE	H	F	64,500.00	8.50 %
111000005	CADF	H	M	38,000.00	5.01 %
111000008	CADF	H	M	38,000.00	5.01 %
111000023	CADF	H	M	38,000.00	5.01 %
111000035	CDPE	H	M	10,000.00	1.32 %
222101925	CDJA	H	M	70,000.00	9.23 %
333221245	CDCE	H	N	60,000.00	7.91 %
Percent:					100.00 %
Sum:				758,500.00	
18					

Report1

Applying Calculation with Slice and Dice



The screenshot shows the BusinessObjects software interface. The main window displays a data table for 'Name: HRM0010'. The table has columns for various departments (CADF, CDCE, CDFP, CDJA, CDPE, CDPH) and a 'Sum' column. The rows represent different categories (F, M, N) and a 'Sum' row. The 'Total Salary' variable is selected in the 'Available Variables' pane on the left.

	CADF	CDCE	CDFP	CDJA	CDPE	CDPH	Sum:
F	474,500.00	1,027,000.00	229,000.00	129,000.00	26,700.00	101,000.00	1,987,200.00
M	479,500.00	394,500.00	588,500.00	695,000.00	58,200.00	232,478.00	2,448,178.00
N		60,000.00			9,700.00		69,700.00
Sum:	954,000.00	1,481,500.00	817,500.00	824,000.00	94,600.00	333,478.00	4,505,078.00

Grouping Data

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

1/20 pt Arial 10 B U

Insert Sum

=<Total Salary>

Report Title

Home Department	Total Salary
CADF	552,500.00
CD Departments	3,082,500.00
Sum:	3,635,000.00

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Home Department Code+ In T
- Sex Id
- Max Bonus
- Total Salary

Formulas

- =Sum(<Total Salary>)

Report1

Cumulative Total

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

1/20 pt Arial 10

=<Total Salary>

Data Map

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Average Salary
- Lowest Salary
- Max Bonus
- Running Total
- Total Salary

Formulas

- =Average(<Total Salary>)
- =Count(<Total Salary>)
- =Sum(<Total Salary>)

CADF

Employee Full Name	Employee Id	Total Salary	Running Total
Anderson, Debbie Sara	111000009	37,500.00	37,500.00
Boughton, Jan Joyce	111000015	37,500.00	75,000.00
Bowen, Beverly Ann	111000014	38,000.00	113,000.00
Burton, Stephen Jon	111000007	35,000.00	148,000.00
Delaney, Donna Alice	111000010	35,000.00	183,000.00
Espinoza, maria Alonzo	111000012	37,500.00	220,500.00
Fountain, Deborah Mary	111000006	37,500.00	258,000.00
Hamilton, Billy Noel	111000001	35,000.00	293,000.00
Lynch, George Bill	111000008	38,000.00	331,000.00
Malcolm, Currie Mary	111000002	38,000.00	369,000.00
Muto, Miho Niki	111000011	38,000.00	407,000.00
Rodriguez, Judy Carmen	111000004	35,000.00	442,000.00
Rodriguez, Tom Jay	111000005	38,000.00	480,000.00
Zamucen, Nick Allen	111000003	37,500.00	517,500.00

CDCE

Employee Full Name	Employee Id	Total Salary	Running Total
Alandy, Dawn R	333781234	60,000.00	577,500.00
Boyer, Kristine D	333112222	60,000.00	637,500.00
Brady, Mike V	333564512	64,500.00	702,000.00
Czae, Lynnn D	333906783	64,500.00	766,500.00

Report1

Variables and Alerts

- Variable:
 - A function or formula that is saved so it can be reused later
 - NOTE: Thick Client stores variables on a local machine. Users on other computers will not be able to use user-defined variables !!! (Unlike Thin Client where it is stored on the server)
- Alerts:
 - When a cell value reaches/exceeds/is less than a predefined value, highlight the cell value

Creating Variables

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

1/20 pt Arial 10 B U

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Total Salary

Formulas

- =<Total Salary>*0.05
- =Sum(<Total Salary>)

Employee Id	Employee Full Name	Home Department	Total Salary	
111000001	Hamilton, Billy Noel	CADF	70,000.00	3,500.00
111000002	Malcolm, Currie Mary	CADF	38,000.00	1,900.00
111000003	Zamucen, Nick Allen	CADF	37,500.00	1,875.00
111000004	Rodriguez, Judy Carmen	CADF	35,000.00	1,750.00
111000005	Rodriguez, Tom Jay	CADF	38,000.00	1,900.00
111000006	Fountain, Deborah Mary	CADF	37,500.00	1,875.00
111000007	Burton, Stephen Jon	CADF	35,000.00	1,750.00
111000008	Lynch, George Bill	CADF	38,000.00	1,900.00
111000009	Anderson, Debbie Sara	CADF	37,500.00	1,875.00
111000010	Delaney, Donna Alice	CADF	35,000.00	1,750.00
111000011	Muto, Miho Niki	CADF	38,000.00	1,900.00
111000012	Espinoza, maria Alonzo	CADF	37,500.00	1,875.00
111000014	Bowen, Beverly Ann	CADF	38,000.00	1,900.00
111000015	Boughton, Jan Joyce	CADF	37,500.00	1,875.00
222101124	Hogan, Edd Frank	CDPH	24,000.00	1,200.00
222101625	Gordon, Ben Jesse	CDJA	64,500.00	3,225.00
222101925	Parrales, Pothier Edgar	CDJA	70,000.00	3,500.00
222111321	Anfanger, John Mark	CDJA	72,000.00	3,600.00
222181928	Rangel, Brenda Eve	CDJA	64,500.00	3,225.00
222182548	Cahn, Steven Joseph	CDJA	70,000.00	3,500.00
222212545	Rosen, Stephen William	CDJA	72,000.00	3,600.00

Report1

Close Help

Creating Alerts

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

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Data Map

Variables

- Birth Date
- Employee Full Name
- Employee Id
- Ethnic Code
- Home Department Code
- Sex Id
- Max Bonus
- Total Salary

Formulas

- =(<Total Salary>)*0.05
- =Sum(<Total Salary>)

Employee Id	Employee Full Name	Home Department	Total Salary	Annual Bonus
111000001	Hamilton, Billy Noel	CADF	70,000.00	3,500.00
111000002	Malcolm, Currie Mary	CADF	38,000.00	1,900.00
111000003	Zamucen, Nick Allen	CADF	37,500.00	1,875.00
111000004	Rodriguez, Judy Carmen	CADF	35,000.00	1,750.00
111000005	Rodriguez, Tom Jay	CADF	38,000.00	1,900.00
111000006	Fountain, Deborah Mary	CADF	37,500.00	1,875.00
111000007	Burton, Stephen Jon	CADF	35,000.00	1,750.00
111000008	Lynch, George Bill	CADF	38,000.00	1,900.00
111000009	Anderson, Debbie Sara	CADF	37,500.00	1,875.00
111000010	Delaney, Donna Alice	CADF	35,000.00	1,750.00
111000011	Muto, Miho Niki	CADF	38,000.00	1,900.00
111000012	Espinoza, maria Alonzo	CADF	37,500.00	1,875.00
111000014	Bowen, Beverly Ann	CADF	38,000.00	1,900.00
111000015	Boughton, Jan Joyce	CADF	37,500.00	1,875.00
222101124	Hogan, Edd Frank	CDPH	24,000.00	1,200.00
222101625	Gordon, Ben Jesse	CDJA	64,500.00	3,225.00
222101925	Parrales, Pothier Edgar	CDJA	70,000.00	3,500.00
222111321	Anfanger, John Mark	CDJA	72,000.00	3,600.00
222181928	Rangel, Brenda Eve	CDJA	64,500.00	3,225.00
222182548	Cahn, Steven Joseph	CDJA	70,000.00	3,500.00
22212545	Rosen, Stephen William	CDJA	72,000.00	3,600.00

Report1

Ranking Data

BusinessObjects - pptreport.rep - [sa]

File Edit View Insert Format Tools Data Analysis Window Help

1/20 pt Arial 10 B U

=<Home Department Code>

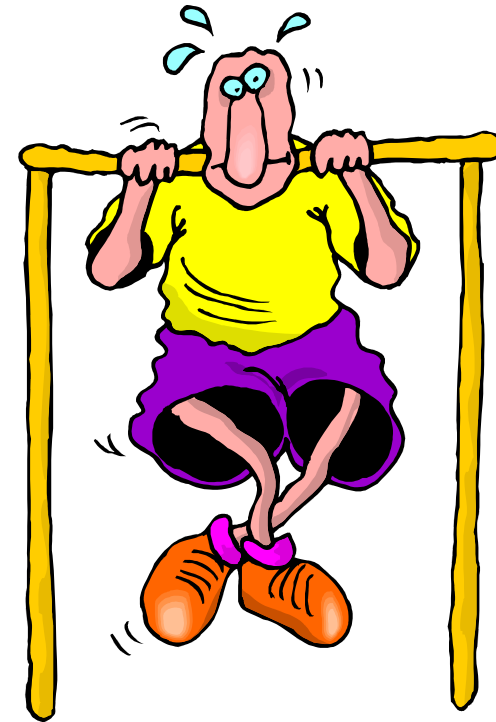
Report Title

Home Departme	Total Salary	Percentage
CDCE	1,481,500.00	32.89 %
CADF	954,000.00	21.18 %
CDJA	824,000.00	18.29 %
Sum:	3,259,500.00	72.35 %
Sum Other:	1,245,578.00	27.65 %
Sum All:	4,505,078.00	100.00 %

Report1

Workshop 5

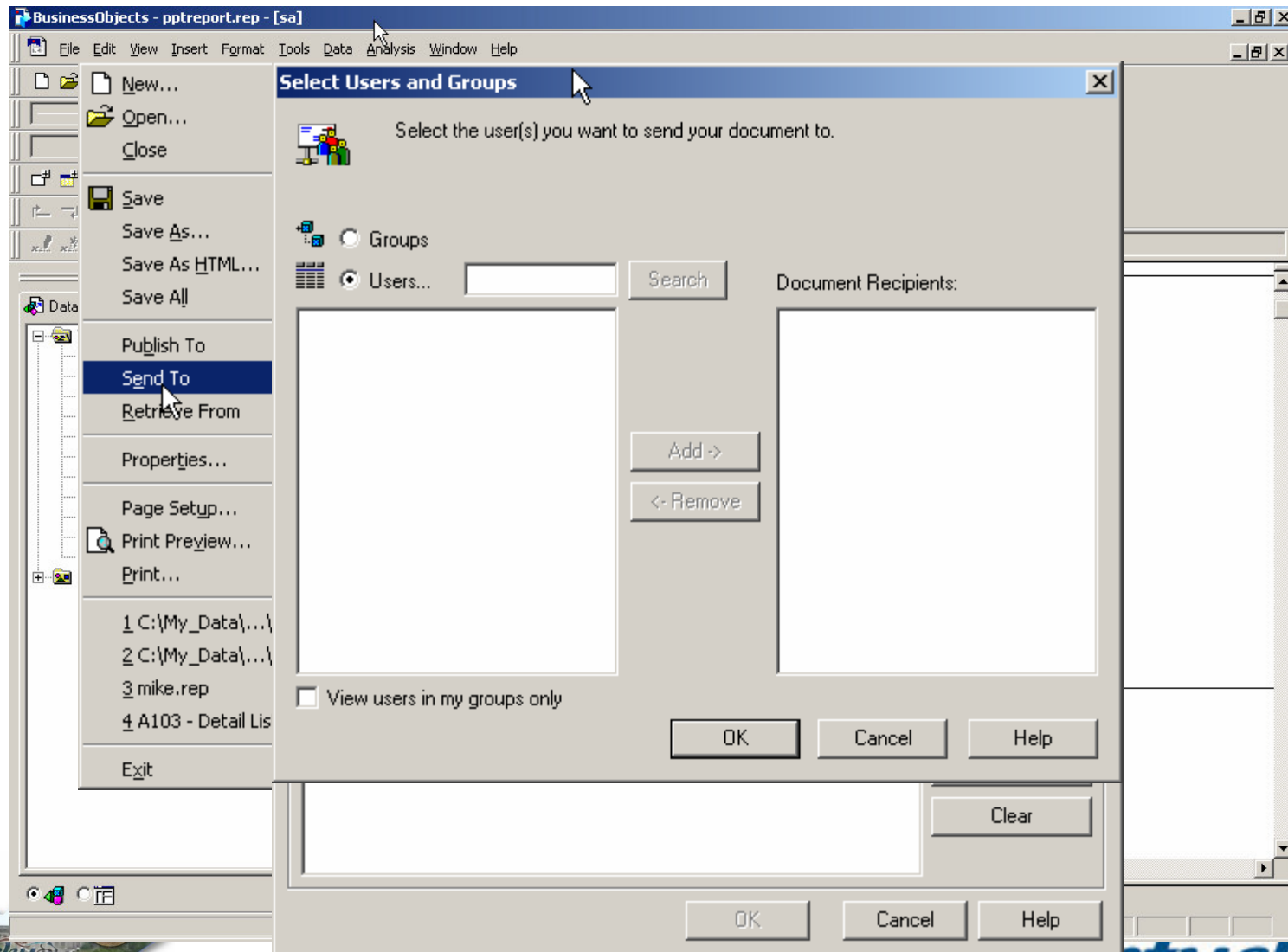
- Create a variable that is 80% of the posting amount
- Create an alerter for posting amounts > 1000
- Add a break on Headquarters Account Code
- Only keep footers, no headers



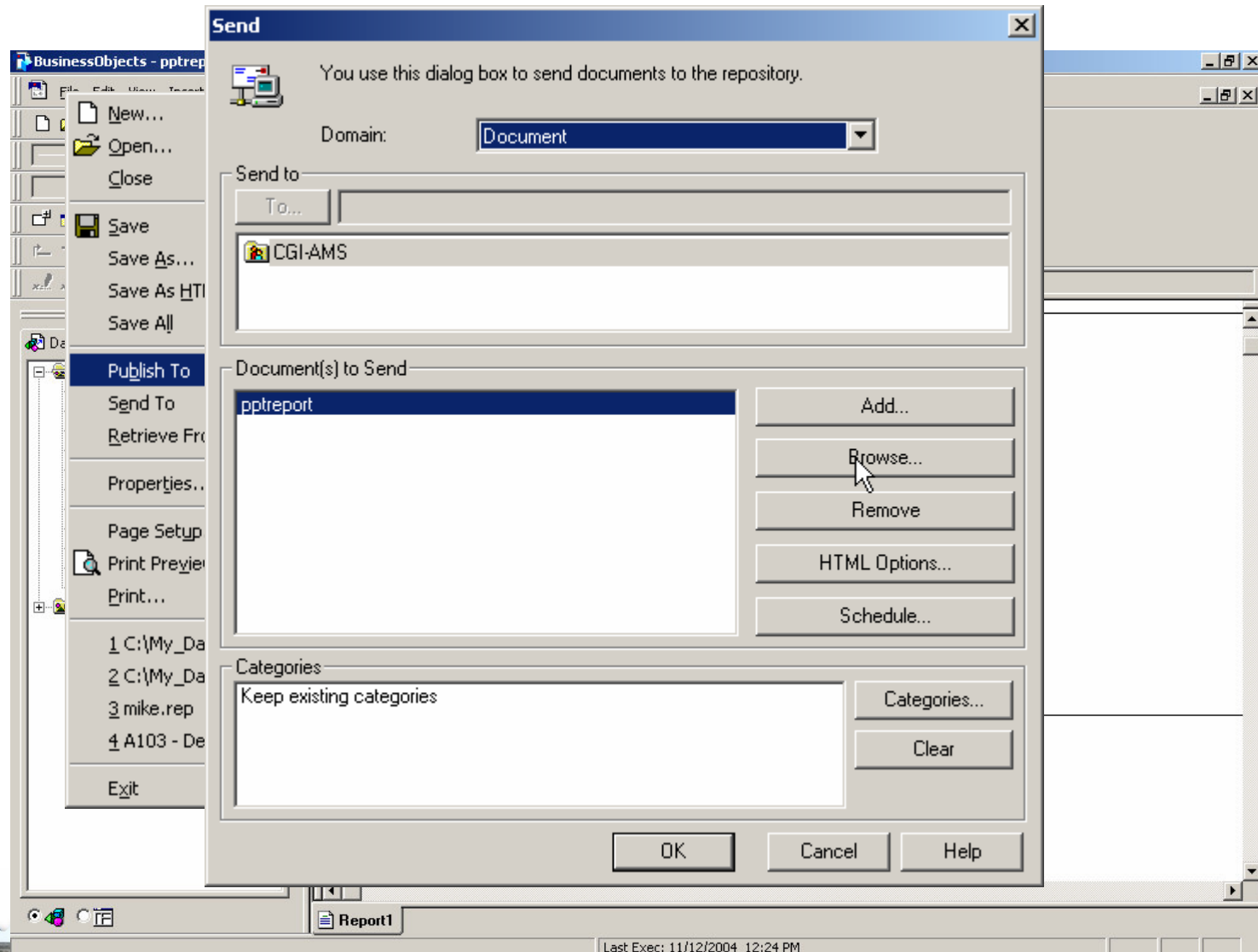
Sharing information

- Send report to users
 - Report is directly sent to selected users
 - Report will show up in users inbox
 - Report is not stored in a central place in the repository
 - NOTE: Supervisor can purge inbox contents !!!!
- Publish Report
 - Report will be put in Repository
 - All users whose security set up allows them to open report can retrieve and run report
- Save Reports
 - For personal user
 - To be printed out and handed out

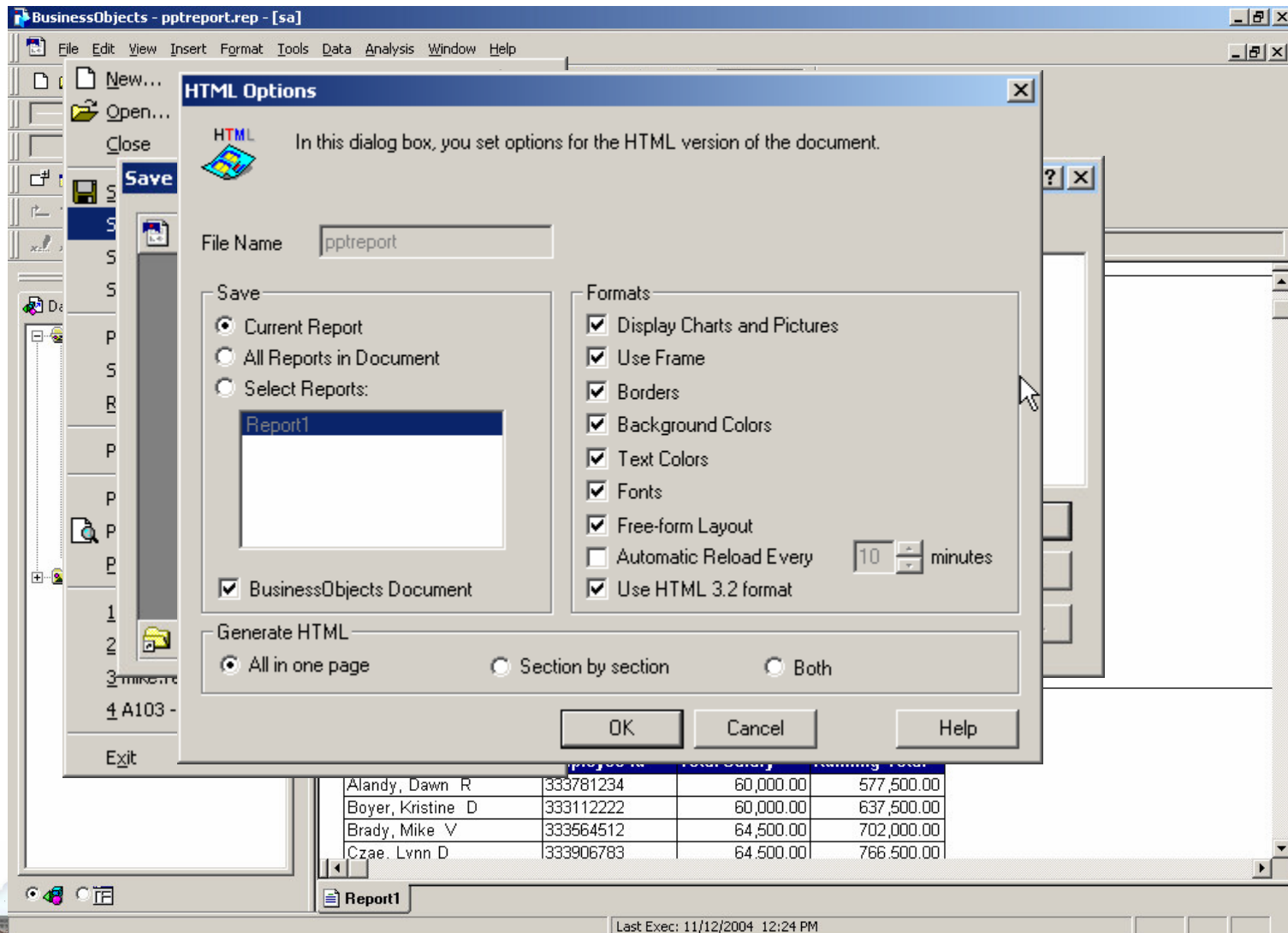
Sending Reports to Users



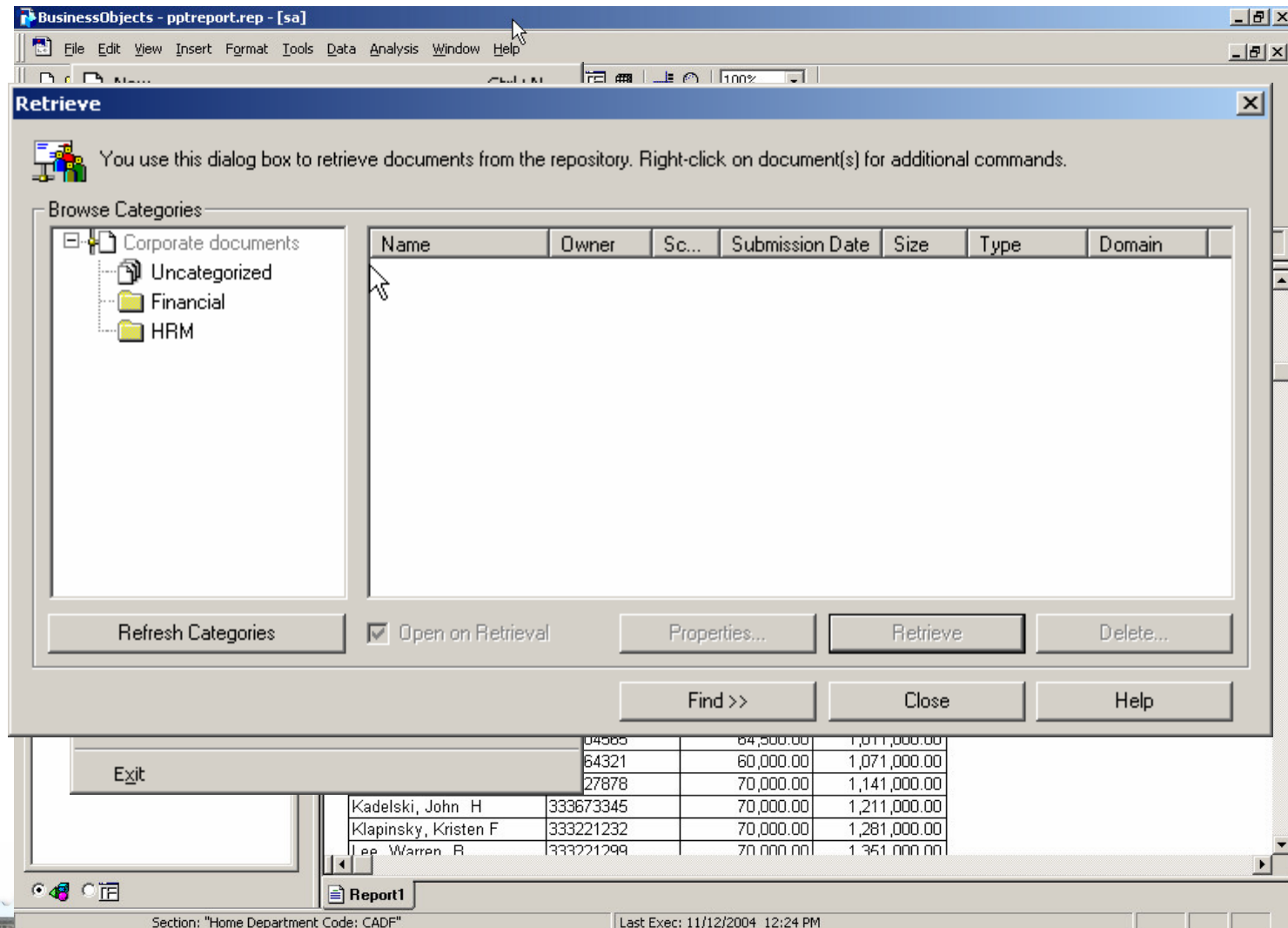
Publishing Documents



Saving as HTML, PDF, Excel

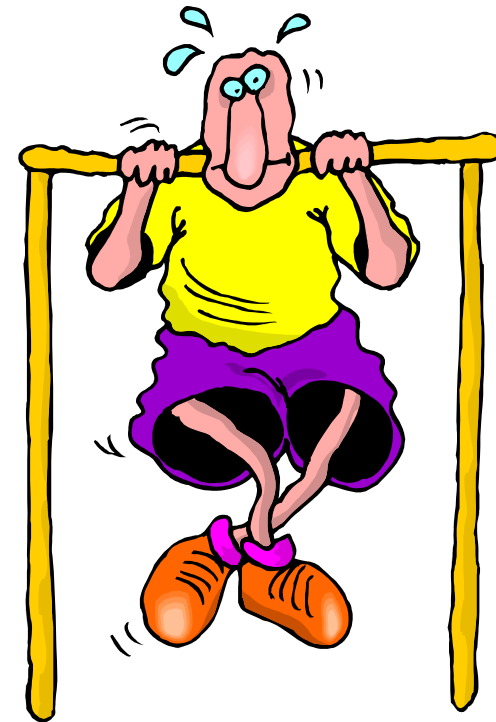


Retrieving Documents



Workshop 6

- Rename report 1 to Report 1 - <student no>
- Export report to the repository
- Open WebIntelligence and run the report



Questions

